

eMail Volume 1

eMail User Guide

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Version 7

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1. DOCUMENT OVERVIEW

This two-volume User Guide describes the eVA requisition process, including shopping, order placement, and receiving, as well as other eMall functionality. The contents of each volume are summarized below.

eMALL® VOLUME 1

eMall Volume 1 contains the following sections:

- eVA Requisition Process Overview
- Accessing the eMall
- Navigating the eMall
- Using the Dashboard
- Creating a Requisition
- Editing Line Items
- Searching the eMall
- Approving a Requisition
- Working with Orders
- Modifying a Requisition
- Working with Change Orders
- Understanding Integration
- Getting Answers to Your Questions

eMALL VOLUME 2

eMall Volume 2 contains the following sections:

- eMall Overview
- Introduction to Receiving
- Receiving Ordered Items
- Receipt Approvals
- Other Receiving Functionality
- Preferences
- Explore
- Operational Reporting
- Getting Answers to Your Questions

USING THIS GUIDE

The features described below are designed to help you find the information you need in this guide; please take a few minutes to review them.

HYPERLINKS

Hyperlinks have been added to help you navigate through the guide. Each entry in the Table of Contents is formatted as a hyperlink that will take you directly to that topic. Cross-references, such as "See Table 6," or "Figure 2 shows ..." are also hyperlinked, so that you can click the reference to go to the related information.

TYPOGRAPHICAL CONVENTIONS

The typographical conventions described in **Table 1** are used throughout this guide. They are designed to provide visual cues that can help to differentiate the various kinds of objects under discussion.

Note that text conventions are applied to the proper name of the item but not to the defining term (screen, field, button, check box, etcetera), which will be omitted for simplicity when possible.

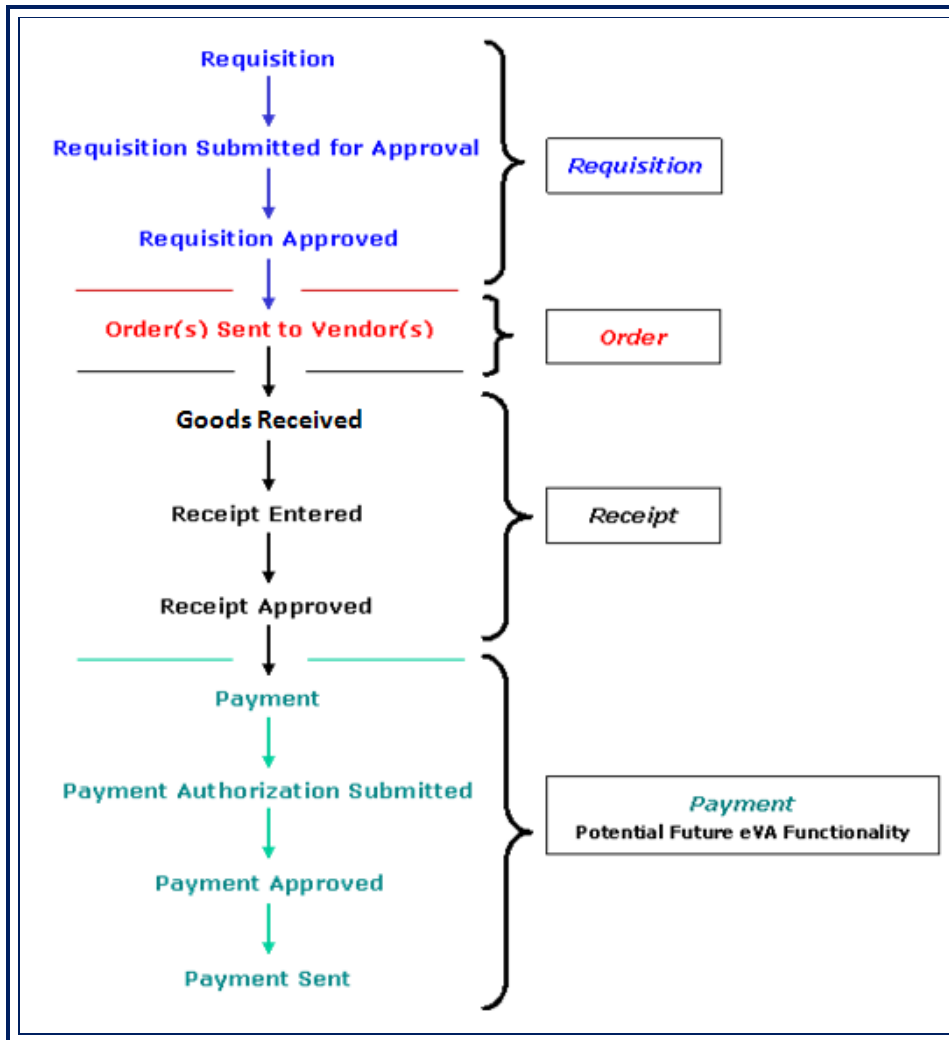
Table 1: Typographical Conventions Employed in This Guide

Item	Convention	Example
Screen Titles	Small caps, bold print	SAVED REPORTS screen DASHBOARD
Field Names	Initial caps, bold print	Title field Description
Control Labels	Initial caps, bold print	Use PCard check box Client Name pick list
Flag or indicator setting	Initial caps, italic print	If the flag is set to <i>Yes</i> , then ...
Parameter value		When set to <i>Statement</i> , ...
Phase or Status		An order in <i>Composing</i> status
Menu Item or Command		Select <i>Save</i> on the File menu
Buttons	Initial caps, bold print	Submit button Save
Links	Links that are active in this document appear in blue text. Position the cursor over the link to see a screen tip.	http://eva.virginia.gov/
	Links that are active in the application but are not active in this document are underlined.	The <u>Requisition</u> link will ...
Cross-references	<p>There are two types of cross-references in this document. All are linked to the object or section to which they refer.</p> <p>Cross-references to tables, figures, and page numbers appear in initial caps, bold print. This type of cross-reference link can also be identified by the shading that appears when it is selected.</p> <p>Cross-references to text appear in blue print and are underlined for easy identification.</p>	<p><u>See</u> Figure 1</p> <p>See Interface Tools for more information.</p>

2. eVA REQUISITION PROCESS OVERVIEW

The following diagram illustrates the eVA procurement process from requisition through payment. This volume focuses on the eVA Requisition process, from Requisition to Order Sent to Vendor, but a brief overview of the entire process is provided below.

Figure 1: eVA Requisition Process End-to-End



PURCHASE REQUESTS AND ORDERS

There are multiple methods for creating orders in eVA. The most common way is to create a Purchase Request (PR) in the eMall, submit it for approval, and apply any required approvals. The eMall creates a purchase order from the approved PR and sends the purchase order to the supplier.

There are also several types of requisitions and purchase orders.



REQUISITIONS

Table 2 shows various types of requisitions that can exist in the eMall, where each type originates, and the associated prefix. A system-generated or imported number is added to the appropriate prefix to create a unique ID number for each requisition. This ID number is used to track the request through the eMall; the prefix lets you identify the request type at a glance, and easily sort requests by type.

Table 2: Requisition Types

Document	Source	Prefix
Purchase Request	eMall	PR
Quick Quote Award	Quick Quote	QQ:QQ
End-to-End Award	eProcurement	E2E:POB
Imported Requisition	Order Import (Agency Interface)	IRQ:Axxx

As indicated in **Table 2**, some requisitions are created in the eMall, while others are imported from another source, such as Quick Quote. **Figure 2** provides an example of a status screen showing a variety of request types, each identifiable by the prefix in the ID number.

Figure 2: Status Screen Displaying Multiple Request Types

ID	Type	Date Created	Status	Title	Total
PR200096		8/9/2004	Composing	Copy of Req for Solicitation	\$7,15000 USD
E2E:POBA13670		9/15/2004	Composing	1448 Requisition	\$40,000.00000 USD
PR201467		9/23/2004	Composing	Test Script 9020	\$301,500.00000 USD
PR202563		10/26/2004	Composing	Untitled Requisition	\$0.00000 USD
IRQ:vv5-v2		10/30/2004	Composing	yyy	\$1,639.98000 USD
PR202848		11/3/2004	Composing	Untitled Requisition	\$0.00000 USD
QQ:QQ000121 AWD76		11/9/2004	Composing	Copy of 2713.4	\$40.00000 USD
E2E:POBA136145		11/10/2004	Composing	SPL 80	\$495.00000 USD
PR202995		11/10/2004	Composing	Untitled Requisition	\$0.00000 USD
QQ:QQ000132 AWD87		11/18/2004	Composing	aa	\$24.00000 USD
PR203287		11/23/2004	Composing	Untitled Requisition	\$1,995.00000 USD
E2E:POBA136207		11/30/2004	Composing	Prod 23	\$280.00000 USD
QQ:QQ000177 AWD93		12/7/2004	Composing	DEV 285 #2	\$50.00000 USD

ORDERS

When a PR (or other type of requisition) is approved, the eMall automatically generates an Order from the approved request. Orders, like requests, can also be imported from other sources. **Table 3** shows the types of orders that can exist in the eMall, where each type originates, and the prefix associated with each order type.

**Table 3: Order Types**

Document	Source	Prefix
Direct Order	eMall (agencies not using eProcurement)	DO
EProcurement Order	eMall (eProcurement agencies)	EP
PCard Order	eMall	PCO
Quick Quote Award	Quick Quote	QQ
End-to-End Award	eProcurement	POB
Imported Order	Order Import (Agency Interface)	DO, PCO, EP

If your agency is enabled for complex eProcurement and/or ERP integration, your eVA orders will begin with **EP**. If not, your eVA orders will begin with **DO**, or, if you are using a purchase card, orders will begin with **PCO**.

IMPORTED AND EXPORTED ORDERS

The eMall allows agencies and other entities to send order requests from the entity system to be fulfilled through eVA. The eMall can also produce completed order and receipt data for entity systems to pick up for their own use.

Imported Orders

Orders can be imported to the eMall for fulfillment by eVA and the Ariba Network (AN). See the *eVA Overview Guide* for information on the AN.

These orders are imported as purchase requests that begin with the prefix IRQ. They can be submitted to the eMall for approvals, if required; or if no approval is needed, a submitted request will transition to a purchase order without user intervention.

Imported orders are subject to the same rules and requirements as orders that are entered online as requisitions.

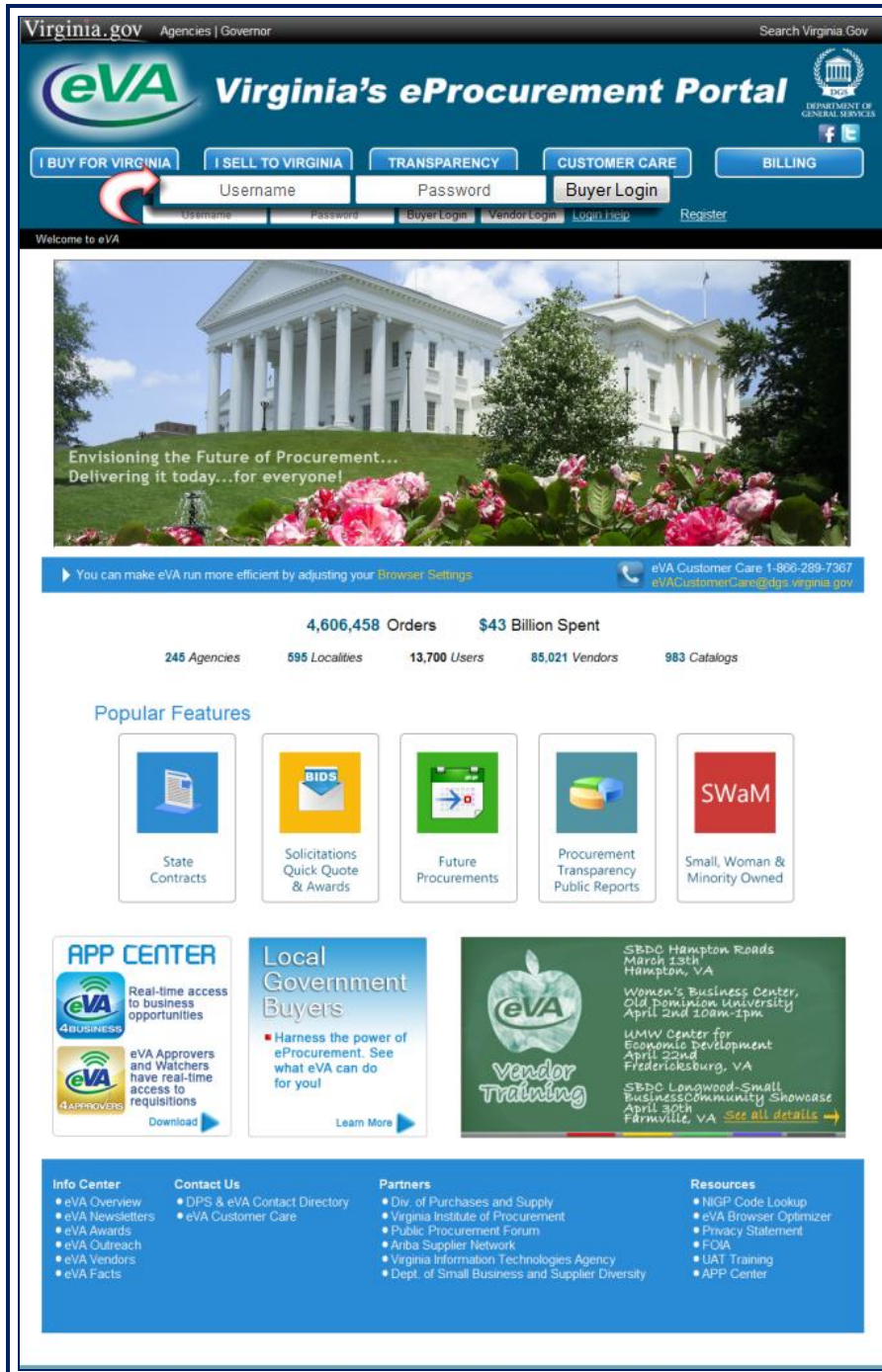
Exported Order and Receipt Data

Each day's purchase order and receipt transactions are compiled into a report and exported in a standard format. Entity systems can retrieve the report for their own agency/entity, and use the data as they wish.

3. ACCESSING THE EMALL

You must have a valid user name and password in order to access the eMall. Go to the **eVA LOGIN** screen at <http://eva.virginia.gov/> and enter your user name and password and click the **Buyer Login** button (Figure 3). A successful login will take you to the **eVA KNOWLEDGE CENTER** screen within the eVA Buyer Portal (Figure 4).

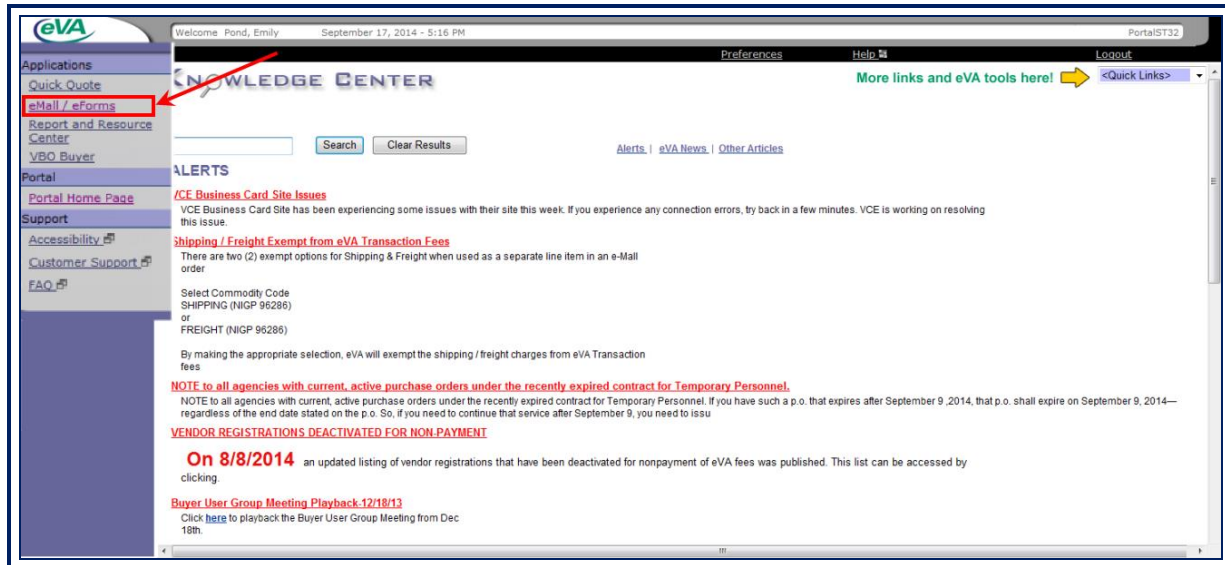
Figure 3: eVA Home Page with Login



ACCESSING THE eMALL

To continue to the eMall, click the [eMall / eForms](#) link in the left navigation panel of the **KNOWLEDGE CENTER** screen (Figure 4). This will open the **My Home** tab of the Ariba Buyer **DASHBOARD**, your entry point to the eMall and all of its features (Figure 13).

Figure 4: Access the eMall from the Knowledge Center

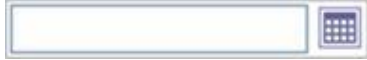

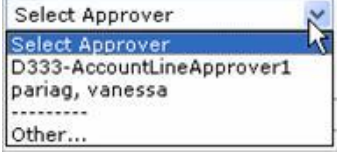

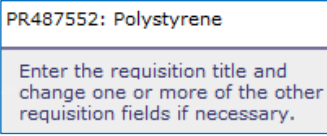
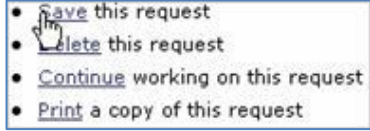


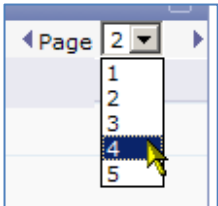
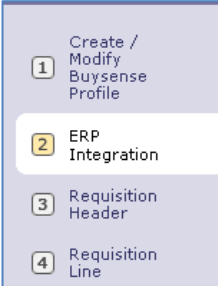



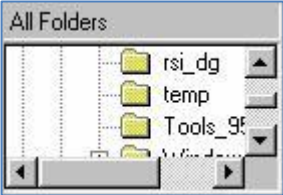
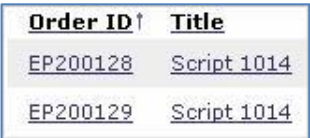
4. NAVIGATING THE EMALL

INTERFACE TOOLS

Table 4 provides an introduction to tools you will find in the eMall user interface. Some of these tools will already be familiar to you, as they are common to many web-based applications.

Table 4: User Interface Tools

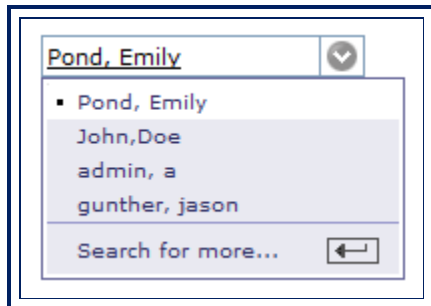
Tool	Example	Function
Calendar Icon and Date Field		Click the Calendar icon to open an interactive calendar that can display nine consecutive months, starting with the current month. Use the calendar to select a date for the associated Date field, or enter a date manually. The accepted format for dates is <i>dd/mm/yyyy</i> .
Dashboard Icon		The Dashboard icon appears on the left end of Command Bar when you leave the DASHBOARD screen. Click this icon to return to the Dashboard. The application gives you the option to save your work before leaving the current screen.
Drop-down list		Click the down arrow to open a list of available values for that field. Some drop-down lists have pre-set values; others are populated by your recent selections. Select <i>Other</i> to open a pick list of all valid options for that field.
Field tips		Position the cursor over an object, such as a field, link, or button, to display a text box with information about that object.
Inline Help Tips		Most eMall screens contain at least one inline help tip, usually near the top, that briefly explains the purpose of the screen and the basic actions that you can take.
Link		There are two kinds of links in the eMall: navigation links and action links. <ul style="list-style-type: none"> Clicking a navigation link will take you to a new screen or web site. Clicking an action link will, as the name implies, initiate an action, such as saving or printing the active request.

Tool	Example	Function
Multiple page navigation		<p>When a data list spans two or more pages, the eMall provides two ways to move between pages:</p> <ul style="list-style-type: none"> • Use the right and left arrows to go forward or backward one page at a time. • Select the down arrow on the drop-down list to see a list of all pages in the section. Select any page number to go directly to that page.
Process Step Navigation Panel		<p>A few transaction processes span several screens, but some of those screens might not be needed for every transaction. For such processes, the Process Step Navigation panel replaces the Left Navigation panel.</p> <p>This navigation panel contains a link to each step in the process, so you can move among them in any order and skip steps that aren't applicable to a particular transaction.</p>
Navigation buttons		<p>Navigation buttons are available on most screens in the eMall. Use them to move between screens, to move between steps in an eMall process, or to exit the current process.</p> <p>DO NOT use your browser's navigation buttons, especially to go backwards. Doing so can cause data to be lost.</p>
Refresh Content		<p>The information on the DASHBOARD screens update automatically when you leave a screen and then return. Use the Refresh Content button when you want to see your updates without leaving the current screen.</p>
Return to Portal Button		<p>The Return to Portal button is available on all DASHBOARD tabs. Click this button to go back to the KNOWLEDGE CENTER.</p>
Scroll bars		<p>Scroll bars appear when the contents of a window are too large to display completely. Select and slide the scroll bars at the right side or bottom of an eMall screen to view material beyond the boundaries of the window.</p> <p>When all of the contents fit inside the display window, scroll bars will not be present.</p>
Sorting		<p>If an underline appears when you position the cursor over a column heading, that column can be sorted alphanumerically. An arrow next to the column heading lets you see whether the information is sorted in ascending order (up) or descending order (down).</p> <ul style="list-style-type: none"> • Click the column heading to sort the data in that column. • Click the column heading a second time to reverse the sort order.

SEARCH FOR MORE ... MENU OPTION

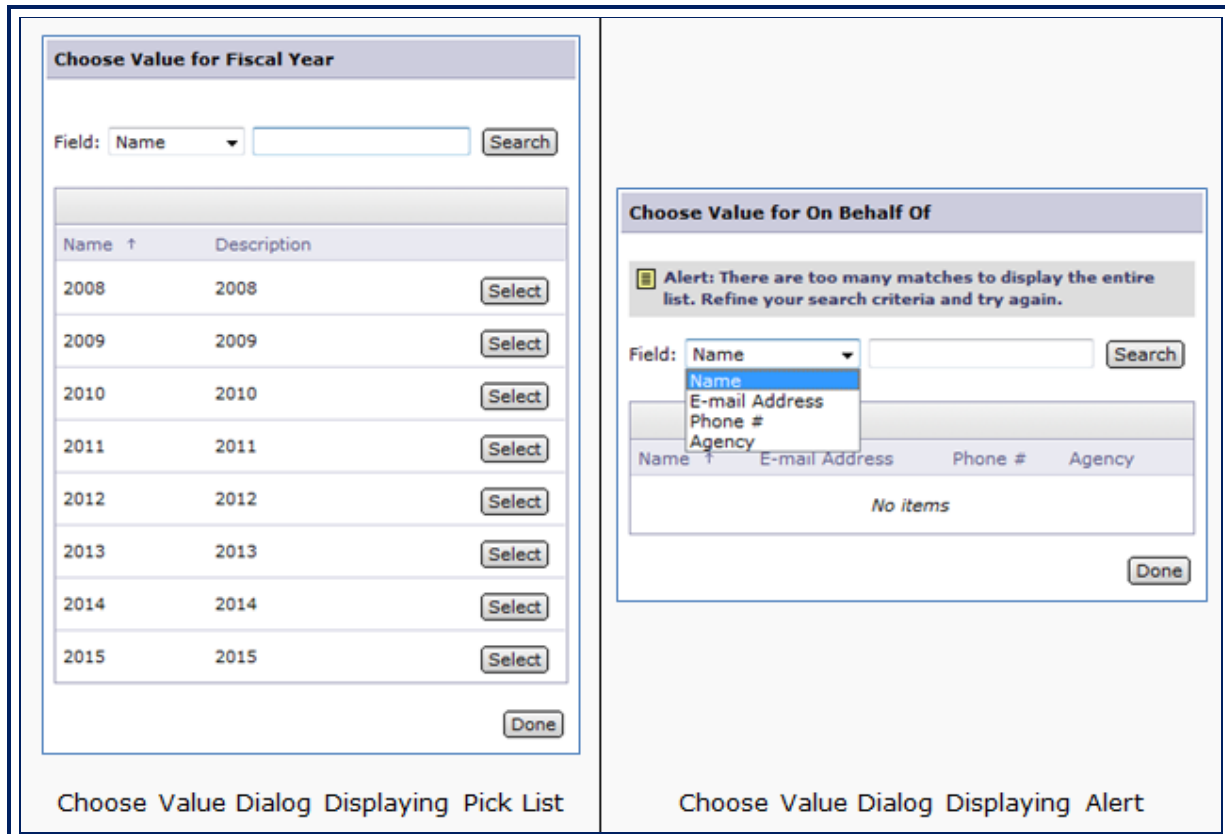
The eMall uses drop-down lists when a selection of values is available. When there are more values than are easily accommodated in a drop-down list, a few values are displayed with the option to **Search for more ...** at the bottom of the list. **Figure 5** shows an example of this option in a drop-down list.

Figure 5: Search for more ... Option



If the value you need does not appear in the drop-down list, click **Search for more ...** to open a **Choose Value** dialog box. Depending on the total number of valid values for that particular field, the **Choose Value** dialog will present either a pick list with search options, or a notice that there are too many values to display, along with search options (**Figure 6**).

Figure 6: Two Examples of the Choose Value Dialog Box



Choose Value Dialog Displaying Pick List

Choose Value Dialog Displaying Alert

Often you will be able to choose among several fields to search on, as shown in **Figure 6**. If the **Field** drop-down list includes the option to select *All*, you can search against all of the fields in the drop-down list at the same time. Be aware, however, that this type of search might take a little longer to run.

5. USING THE DASHBOARD

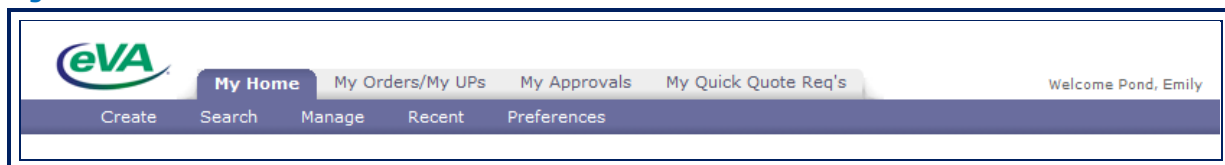
The eMall **DASHBOARD** comprises a set of configurable tabs, each of which displays one or more list frames, and a command bar. This is your “command center,” from which you can access all of the tasks associated with creating requisitions and receiving orders, monitor status, and perform various administrative chores.

This section provides a detailed introduction to the Command Bar, followed by information about each of the standard Dashboard tabs.

THE COMMAND BAR

The **Command Bar**, with its drop-down menus and screen tabs, appears near the top of the screen. It is accessible from any **DASHBOARD** tab.

Figure 7: The Dashboard Command Bar



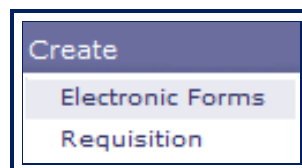
COMMAND BAR MENUS

The **Command Bar** features five drop-down menus in addition to the tabs. Each menu is described below.

“CREATE” MENU

The **Create** menu (Figure 8) lists the various objects that you are authorized to create in the eMall. The options listed on your **Create** menu may vary from those shown here, depending upon the permissions assigned to you. For example, electronic forms (eForms) are available through the eMall and are being added on an ongoing basis; however, you must have the appropriate permissions assigned to you in order to see the eForms.

Figure 8: Create Menu Selections

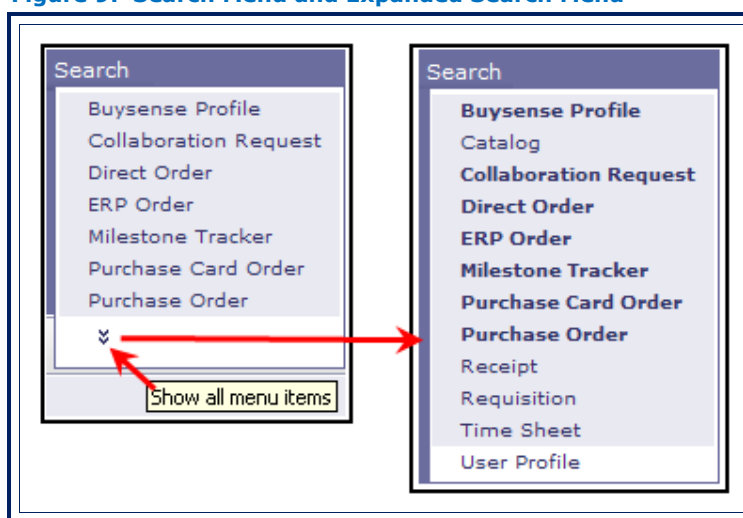


"SEARCH" MENU

The **Search** menu presents a list of the searchable item types available to you, based on your assigned permissions. Double arrows at the bottom of the menu indicate that more selections are available. Click the double arrows to see the expanded **Search** menu (Figure 9). The expanded menu displays all available selections, with items from the original list in bold text.

When you select an object on the **Search** menu, the screen that opens contains search parameters that are specific to your selection. See [Searching the eMall](#) for more information regarding the **SEARCH** screens.

Figure 9: Search Menu and Expanded Search Menu



"MANAGE" MENU

This menu provides access to certain administrative tools, such as the **Commodity Code Manager** and the **Catalog Manager**, and to system-generated reporting tools. Receiving tasks also can be accessed through the **Manage** menu. These features are described in detail in *eMall User Guide, Volume 2*.

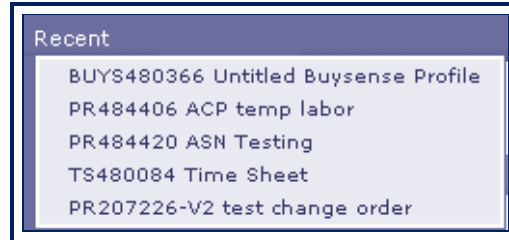
Figure 10: Manage Menu Selections



"RECENT" MENU

The **Recent** menu provides quick access to the five most recently viewed documents, including requisitions, Quick Quote requests, user profiles, eForms, time sheets, and Buysense profiles.

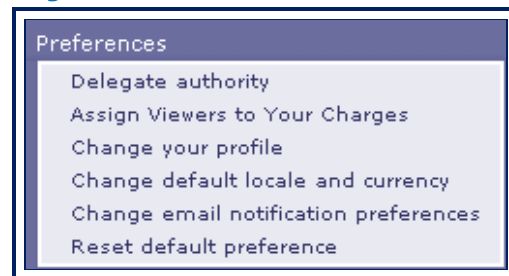
Figure 11: Menu of Recently Viewed Documents



"PREFERENCES" MENU

The **Preferences** menu provides access to eMall features that you can customize according to your needs. These include your profile information and other attributes that relate to your abilities inside the eMall, such as the ability to delegate approval authority and to determine the type and frequency of email notifications (**Figure 12**).

Figure 12: Preferences Menu Selections



COMMAND BAR TABS

The number of tabs on your **Command Bar** depends on two factors:

- The extent to which the eMall has been customized for your agency, and
- The permissions assigned to you.

In the example shown below in **Figure 13**, there are four tabs. You can add or delete tabs as needed. You can also add, remove, and rearrange content to best meet your needs. See [Configuring Dashboard Tabs](#) to learn how to customize these tabs.

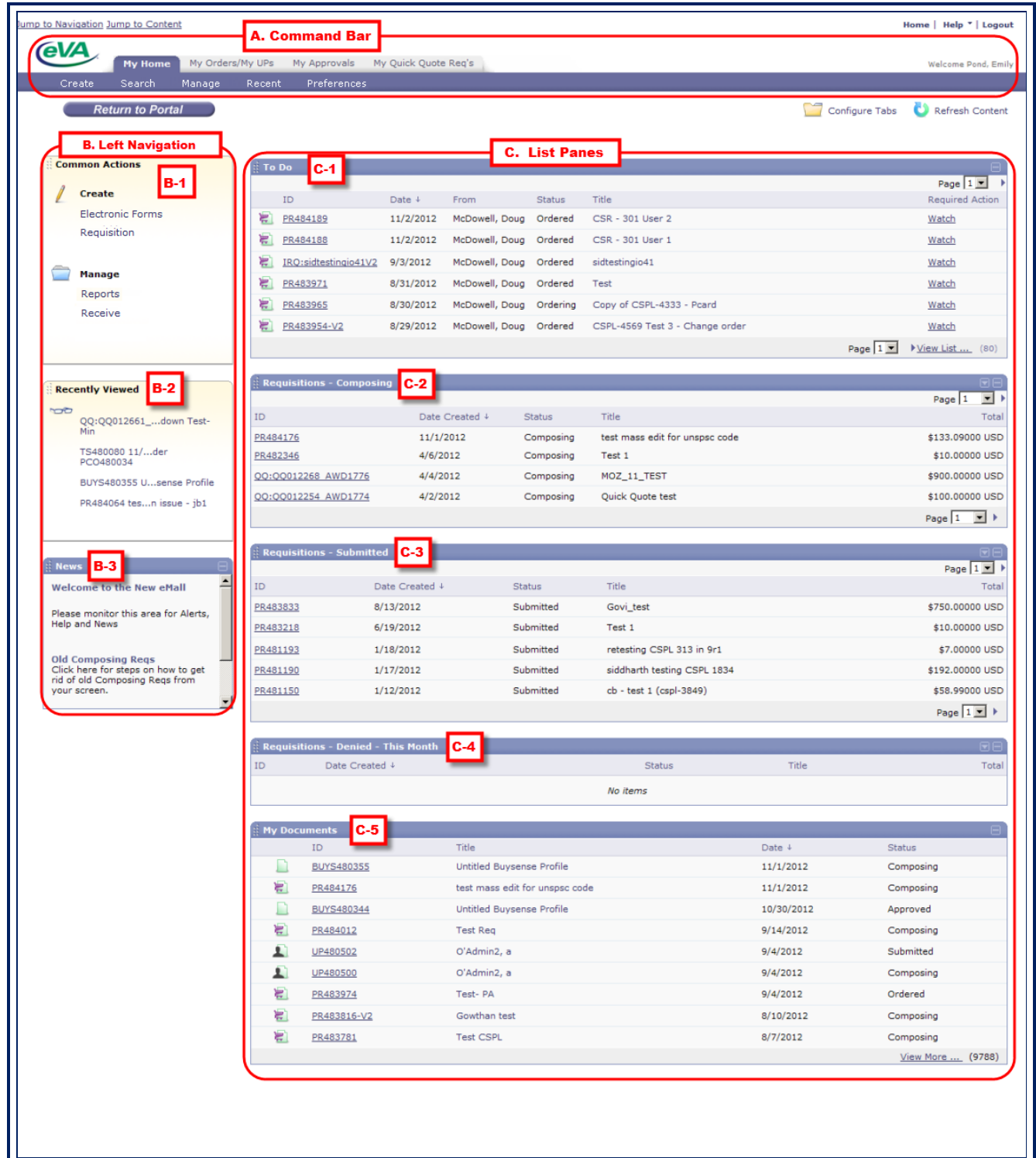
"MY HOME" TAB

The **My Home** tab is the main **DASHBOARD** screen. **Figure 13** provides an overview of the My Home tab (including the Command Bar) with the sections numbered, followed by a key that gives the section name for each number.

USING THE DASHBOARD

The first time you click the [eMall / eForms](#) link in the **KNOWLEDGE CENTER**, the **DASHBOARD** screen opens to the **My Home** tab. After the first time, the screen will open to the last active tab.

Figure 13: The "My Home" Tab - Your eMall Dashboard



The screenshot displays the eMall Dashboard 'My Home' tab. The interface includes a top navigation bar with the eVA logo, 'My Home' tab, and links for 'My Orders/My UPs', 'My Approvals', and 'My Quick Quote Req's'. A 'Command Bar' (A) contains 'Create', 'Search', 'Manage', 'Recent', and 'Preferences' buttons. A 'Left Navigation' pane (B) on the left includes 'Common Actions' (B-1) with 'Create' and 'Manage' sections, 'Recently Viewed' (B-2) with a list of items, and 'News' (B-3) with a welcome message. The main content area (C) contains several list panes: 'To Do' (C-1) with a table of pending items, 'Requisitions - Composing' (C-2) with a table of items in progress, 'Requisitions - Submitted' (C-3) with a table of submitted items, 'Requisitions - Denied - This Month' (C-4) showing no items, and 'My Documents' (C-5) with a table of documents. Each table includes columns for ID, Date, From, Status, Title, and Total, with pagination controls at the bottom of each list.

A. Command Bar

B. Left Navigation

B-1

B-2

B-3

C. List Panes

C-1

ID	Date +	From	Status	Title	Required Action
PR484189	11/2/2012	McDowell, Doug	Ordered	CSR - 301 User 2	Watch
PR484188	11/2/2012	McDowell, Doug	Ordered	CSR - 301 User 1	Watch
IRQ:sidtestingio41V2	9/3/2012	McDowell, Doug	Ordered	sidtestingio41	Watch
PR483971	8/31/2012	McDowell, Doug	Ordered	Test	Watch
PR483965	8/30/2012	McDowell, Doug	Ordering	Copy of CSPL-4333 - Poard	Watch
PR483954-V2	8/29/2012	McDowell, Doug	Ordered	CSPL-4569 Test 3 - Change order	Watch

C-2

ID	Date Created +	Status	Title	Total
PR484176	11/1/2012	Composing	test mass edit for unspsc code	\$133.09000 USD
PR482346	4/6/2012	Composing	Test 1	\$10.00000 USD
QQ:QQ012268_AWD1776	4/4/2012	Composing	MOZ_11_TEST	\$900.00000 USD
QQ:QQ012254_AWD1774	4/2/2012	Composing	Quick Quote test	\$100.00000 USD

C-3

ID	Date Created +	Status	Title	Total
PR483833	8/13/2012	Submitted	Govi_test	\$750.00000 USD
PR483218	6/19/2012	Submitted	Test 1	\$10.00000 USD
PR481193	1/18/2012	Submitted	retesting CSPL 313 in 9r1	\$7.00000 USD
PR481190	1/17/2012	Submitted	siddharth testing CSPL 1834	\$192.00000 USD
PR481150	1/12/2012	Submitted	cb - test 1 (cspl-3849)	\$58.99000 USD

C-4

ID	Date Created +	Status	Title	Total
No items				

C-5

ID	Title	Date +	Status
BUYS480355	Untitled Buysense Profile	11/1/2012	Composing
PR484176	test mass edit for unspsc code	11/1/2012	Composing
BUYS480344	Untitled Buysense Profile	10/30/2012	Approved
PR484012	Test Req	9/14/2012	Composing
UP480502	O'Admin2, a	9/4/2012	Submitted
UP480500	O'Admin2, a	9/4/2012	Composing
PR483974	Test- PA	9/4/2012	Ordered
PR483816-V2	Gowthan test	8/10/2012	Composing
PR483781	Test CSPL	8/7/2012	Composing

Key to Figure 13*

Section	Number	Subsection
The Command Bar	A	N/A
Left Navigation Panel	B-1	Common Actions
	B-2	Recently Viewed
	B-3	News
List Panes	C-1	To Do
	C-2	Requisitions – Composing
	C-3	Requisitions – Submitted
	C-4	Requisitions – Denied – This Month
	C-5	My Documents

*For more information about any of these items, click the corresponding link.

LEFT NAVIGATION PANEL

The **DASHBOARD** left navigation panel is available on the **MY HOME** screen (Figure 13). It comprises three separate windows designed to provide quick access to common actions, work in progress, and news.

B-1 Common Actions

The **Common Actions** window combines the selections found on the **Create** and **Manage** menus. You might have noticed that the links and commands available in the left navigation panel are also available in the **Command Bar** menus. This arrangement is in keeping with the concept of a command center, where quick access to major functions is expected; however, you can choose the access methods with which you are most comfortable.

B-2 Recently Viewed

The **Recently Viewed** window contains links to the last five documents you looked at. These will be the same documents that you access from the **Recent** menu.

B-3 News

The **News** window displays information specific to the eMall. This is different from the **KNOWLEDGE CENTER**, which displays news and information about all components of the eVA eProcurement tools. Check the **News** window to find information about enhancements to the eMall and helpful hints to help you get the most from your eMall experience.

DASHBOARD LISTS

The **MY HOME** screen displays several configurable lists of requests. Each list appears in its own frame with a set of tools to manage its appearance and order. **Figure 14** shows the location and function of these tools. To see details of any list item, click its ID number.

Figure 14: List Tools



Filtering Dashboard Lists

In addition to the standard tool set, some dashboard lists can be filtered to display only specified information.

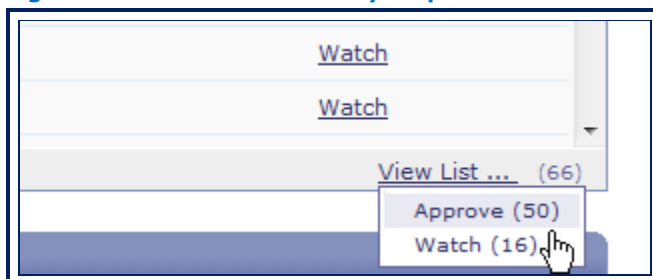
- If the list contains multiple document types, as can be the case in the **My Documents** list, or offers a choice of actions the user can take, like the **To Do** list, you will see a **View** menu in the lower right corner of the list, as shown in **Figure 15**. After you apply a filter to the list, you can further control the appearance and organization of the list.
- If the list contains homogenous documents (only requisitions in *Composing* status, for example), there is no filtering, but you can control the appearance and organization of the list.

The following section concerning the **To Do** list includes more information on how to customize the appearance of Dashboard lists.

C-1 To Do List

The **To Do List** is often the first list under the **Command Bar**. (The position of each list on the screen can be customized for individual agencies.) The **To Do** list groups together all requisitions and other requests that require some action on your part; requests that you can approve, deny, watch, or forward to another user. Controls at the bottom of the list allow filtering by required action, as shown below in **Figure 15**.

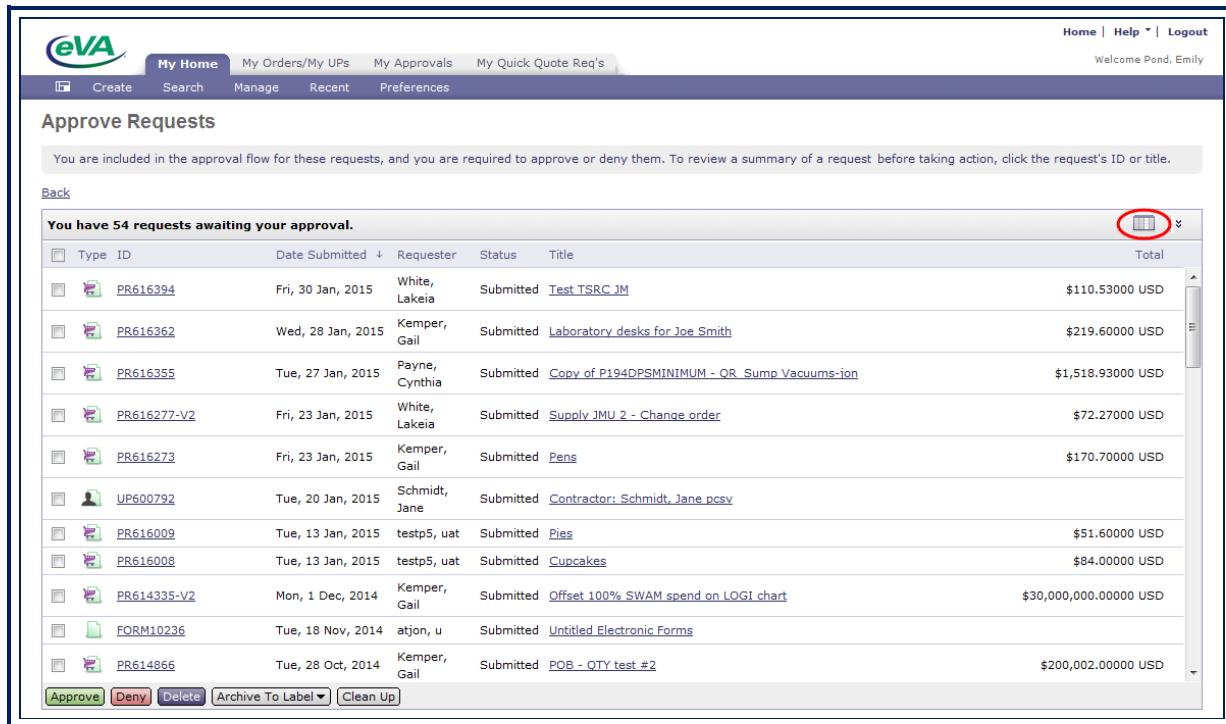
Figure 15: Filter To Do Lists by Required Action



Choose one of the filters shown to go to a list screen where you can continue to work, or you can further customize the way the information is presented (Figure 16).

In this example, the *Approve* filter is selected to display the **APPROVE REQUESTS** screen. All items displayed on this screen require the user's approval.

Figure 16: Approve Requests Screen – Location of Options Menu



Approve Requests

You are included in the approval flow for these requests, and you are required to approve or deny them. To review a summary of a request before taking action, click the request's ID or title.

[Back](#)

You have 54 requests awaiting your approval.

Type	ID	Date Submitted	Requester	Status	Title	Total
	PR616394	Fri, 30 Jan, 2015	White, Lakeia	Submitted	Test TSRC JM	\$110.53000 USD
	PR616362	Wed, 28 Jan, 2015	Kemper, Gail	Submitted	Laboratory desks for Joe Smith	\$219.60000 USD
	PR616355	Tue, 27 Jan, 2015	Payne, Cynthia	Submitted	Copy of P194DPSMINIMUM - QR Sump Vacuums-ion	\$1,518.93000 USD
	PR616277-V2	Fri, 23 Jan, 2015	White, Lakeia	Submitted	Supply JMU 2 - Change order	\$72.27000 USD
	PR616273	Fri, 23 Jan, 2015	Kemper, Gail	Submitted	Pens	\$170.70000 USD
	UP600792	Tue, 20 Jan, 2015	Schmidt, Jane	Submitted	Contractor: Schmidt, Jane pcsv	
	PR616009	Tue, 13 Jan, 2015	testp5, uat	Submitted	Pies	\$51.60000 USD
	PR616008	Tue, 13 Jan, 2015	testp5, uat	Submitted	Cupcakes	\$84.00000 USD
	PR614335-V2	Mon, 1 Dec, 2014	Kemper, Gail	Submitted	Offset 100% SWAM spend on LOGI chart	\$30,000,000.00000 USD
	FORM10236	Tue, 18 Nov, 2014	atjon, u	Submitted	Untitled Electronic Forms	
	PR614866	Tue, 28 Oct, 2014	Kemper, Gail	Submitted	POB - QTY test #2	\$200,002.00000 USD

[Approve](#) [Deny](#) [Delete](#) [Archive To Label](#) [Clean Up](#)

Click the table icon located at the top right corner of the results list to access an options menu that will allow you to further customize the list display (Figure 17).

Figure 17: To Do List Options Menu



Click here for Options menu

Show / Hide Columns

- ☒ Type
- ☒ ID
- ☒ Date Submitted
- ☒ Requester
- ☒ Status
- ☒ Title
- ☒ Total

Group by Column

- Type
- ID
- Date Submitted
- Requester
- Status
- Title
- Total

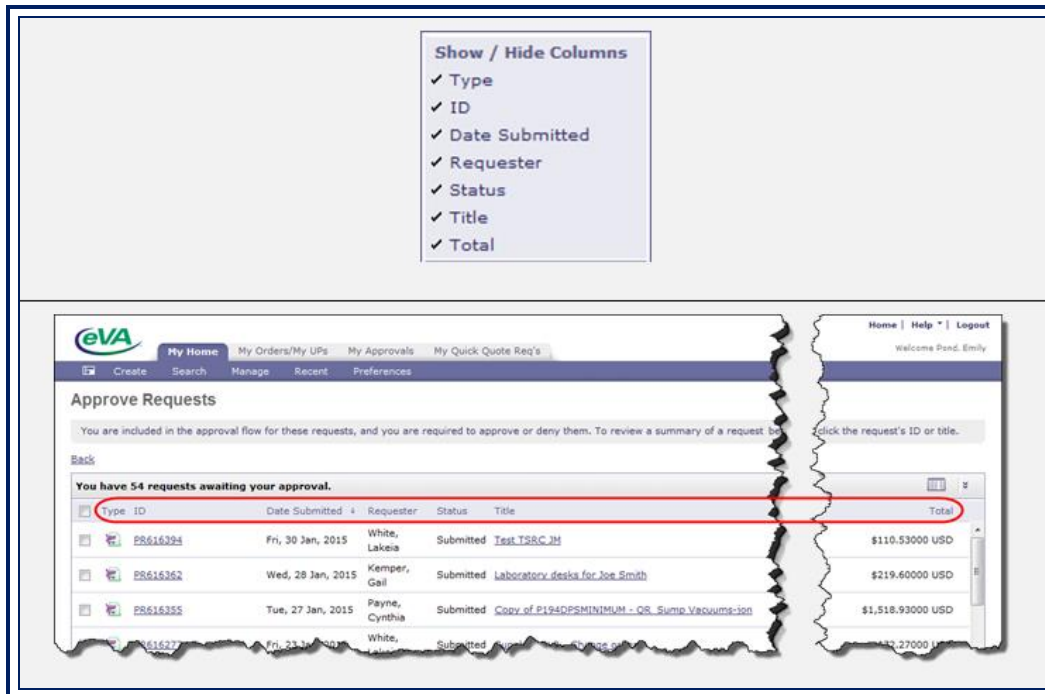
Export to Excel

- Export all Rows
- Export Current Page

Show/Hide Columns

The first section of the options menu lists all of the columns that make up the results list. In this case, notice that under *Show/Hide Columns*, all of the items are checked, and all of these columns are visible on the **Approve Requests** list (Figure 18).

Figure 18: Options Menu Controls Column Visibility



If you were to clear the check mark beside *Type* (by clicking *Type*), that column would be hidden on the screen. Lists that, by definition, contain only one type of document usually have the *Type* column hidden by default.

Group By Column

The next section of the options menu (Group by Column) offers the ability to group the related list by any of its column headings. One possible grouping that many users find helpful is Group by Requestor.



IMPORTANT! You can select only one **Group By** value at a time.

Notice that **Requester** no longer appears as a column heading in **Figure 19**. In fact, if you look at the option menu again, you will see that *Requester* is no longer checked under **Show/Hide Columns** (**Figure 20**). Instead, each Requester value appears as an expandable row in the list.

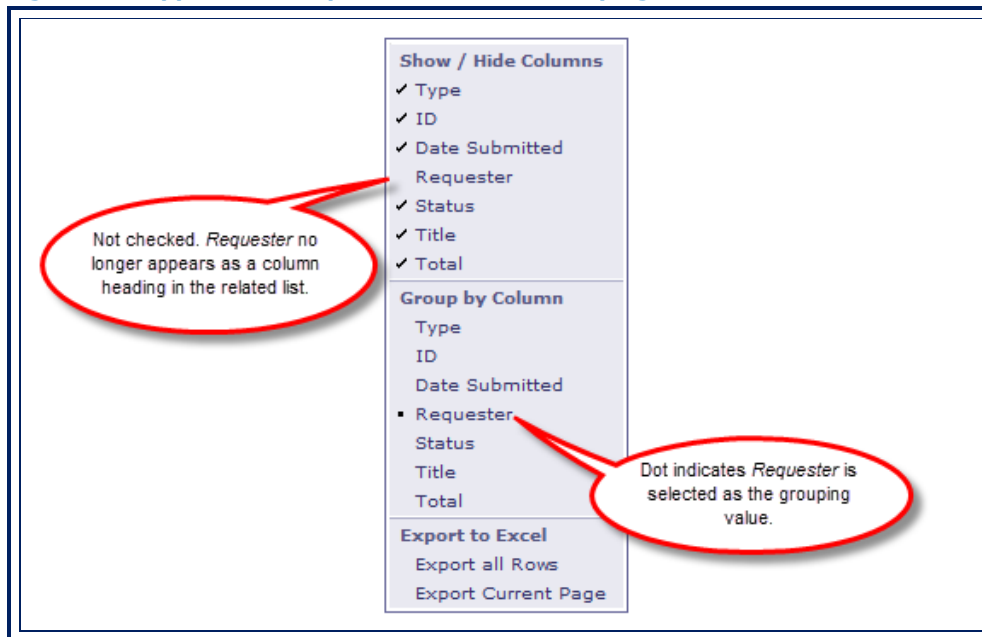
Requesters are listed in descending alphabetical order (from A to Z). If a Requester has more than one request awaiting approval, the requests are listed in date order with the newest on top.

Figure 19: Approvals Grouped by Requester

You have 56 requests awaiting your approval.

Type	ID	Date Submitted	Status	Title	Total
▼ Requester: atdoug, u (7)					
	PR614446	Wed, 17 Sep, 2014	Submitted	test	\$34,746.81000 USD
	PR614290	Thu, 4 Sep, 2014	Submitted	test	\$73,181.45000 USD
	PR614255	Wed, 27 Aug, 2014	Submitted	test	\$67,658.78000 USD
	PR614059	Wed, 30 Jul, 2014	Submitted	ff	\$36,964.60000 USD
	PR613633	Wed, 2 Jul, 2014	Submitted	test	\$31,507.00000 USD
	PR612202	Tue, 4 Mar, 2014	Submitted	jason test 3	\$4.00000 USD
	PR607695	Wed, 20 Mar, 2013	Submitted	Copy of UAT push notification test 2- C]	\$246.81000 USD
▼ Requester: Cake, Tom (1)					
	UP600676	Tue, 4 Mar, 2014	Submitted	Contractor: Cake, Tom pcsv	
▶ Requester: Caudill7, Shane (3)					
▶ Requester: Crown, Tom (1)					
▶ Requester: Doe, John (1)					
▶ Requester: Eformtester, Gail (1)					
▶ Requester: Erbe, Janne (1)					
▶ Requester: Foster, Dave (1)					
<div><div>Approve</div><div>Deny</div><div>Delete</div><div>Archive To Label</div><div>Clean Up</div></div>					

Figure 20: Approval List Options Menu with Grouping Value Selected



C-2, **C-3**, and **C-4** Requisitions Lists

Your active requisitions are displayed in lists grouped by status. This makes it easier to keep track of your work in progress.

If you have started a requisition but do not want to submit it right away, you can save the partially completed requisition. It will be held in *Composing* status and displayed under **Requisitions – Composing (C-2)**.

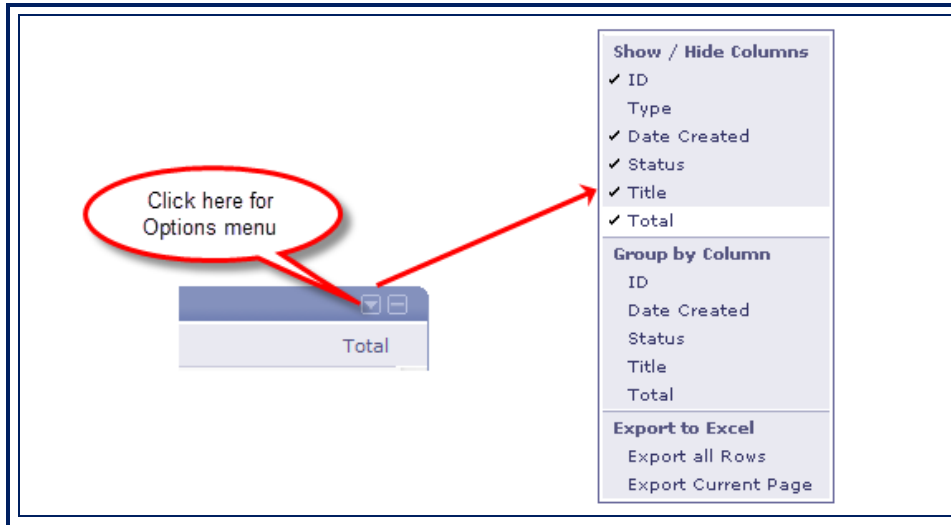
When you submit a *Composing* requisition for approval, its status changes to *Submitted* and it moves from the **Requisitions – Composing** list to the **Requisitions - Submitted** list (C-3), pending approval.

Requisitions that have been denied will appear under **Requisitions – Denied – This Month (C-4)**.

Note that this list is based on calendar months, so if one requisition is denied on March 2nd and another is denied on March 25th, both will drop off this list on April 1st.

These three lists can be sorted by any column. In addition, if you click the down arrow in the upper right corner of one of these lists, an options menu opens (**Figure 21**), allowing further customization of the list display. A detailed discussion about using options menus to customize list display can be found in section [C-1, To Do List](#).

Figure 21: Customize Lists with Options Menu

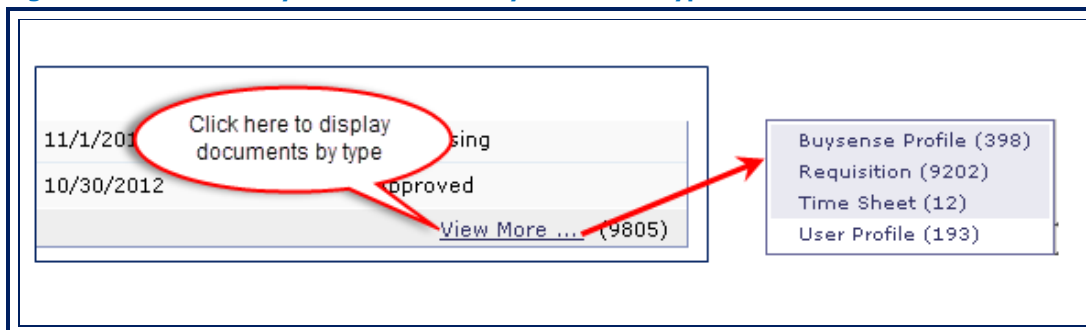


NOTE: Some options menus are accessed by clicking an arrow (☐), while others are accessed by clicking a table icon (☐), but functionality is the same regardless of access point.

C-5 My Documents

The **My Documents** list contains all of the requests you create, regardless of status, including Quick Quote requests, user profile updates, eForms, and Time Sheets. To see only one type of document, click the View More action link in the lower right corner of the **My Documents** list, and select the desired document type (**Figure 22**).

Figure 22: Filter the My Documents List by Document Type

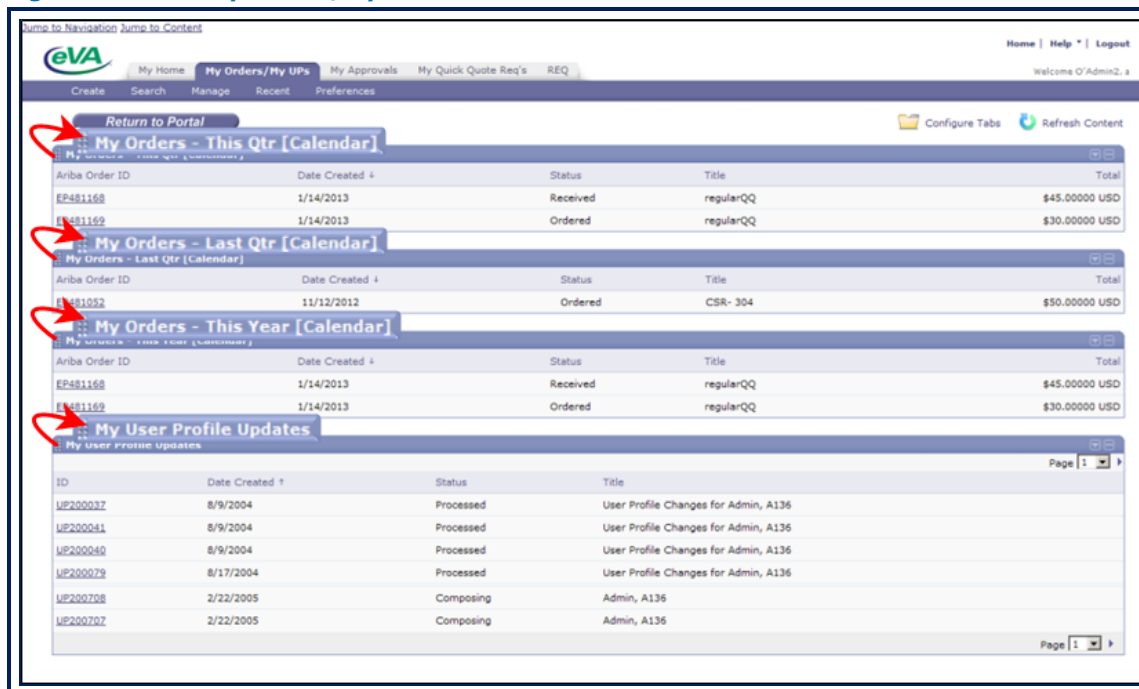


OTHER COMMAND BAR TABS

“MY ORDERS/MY UPS” TAB

This tab displays your orders (requisitions you have submitted and that have been approved) grouped by date, as well as all changes you have made to your User Profile (UP), as shown in Figure 23.

Figure 23: The “My Orders/My UPS” Dashboard Tab



The screenshot displays the eVA dashboard interface. At the top, there is a navigation bar with tabs: 'My Home', 'My Orders/My UPS', 'My Approvals', 'My Quick Quote Req's', and 'REQ'. Below the navigation bar, there are four main sections, each with a table of data. Red arrows point to the 'My Orders - This Qtr [Calendar]', 'My Orders - Last Qtr [Calendar]', 'My Orders - This Year [Calendar]', and 'My User Profile Updates' sections.

My Orders - This Qtr [Calendar]

Arriba Order ID	Date Created	Status	Title	Total
EP481168	1/14/2013	Received	regularQQ	\$45.00000 USD
EP481169	1/14/2013	Ordered	regularQQ	\$30.00000 USD

My Orders - Last Qtr [Calendar]

Arriba Order ID	Date Created	Status	Title	Total
EP481052	11/12/2012	Ordered	CSR- 304	\$50.00000 USD

My Orders - This Year [Calendar]

Arriba Order ID	Date Created	Status	Title	Total
EP481168	1/14/2013	Received	regularQQ	\$45.00000 USD
EP481169	1/14/2013	Ordered	regularQQ	\$30.00000 USD

My User Profile Updates

ID	Date Created	Status	Title
UP200037	8/9/2004	Processed	User Profile Changes for Admin, A136
UP200041	8/9/2004	Processed	User Profile Changes for Admin, A136
UP200040	8/9/2004	Processed	User Profile Changes for Admin, A136
UP200079	8/17/2004	Processed	User Profile Changes for Admin, A136
UP200708	2/22/2005	Composing	Admin, A136
UP200707	2/22/2005	Composing	Admin, A136

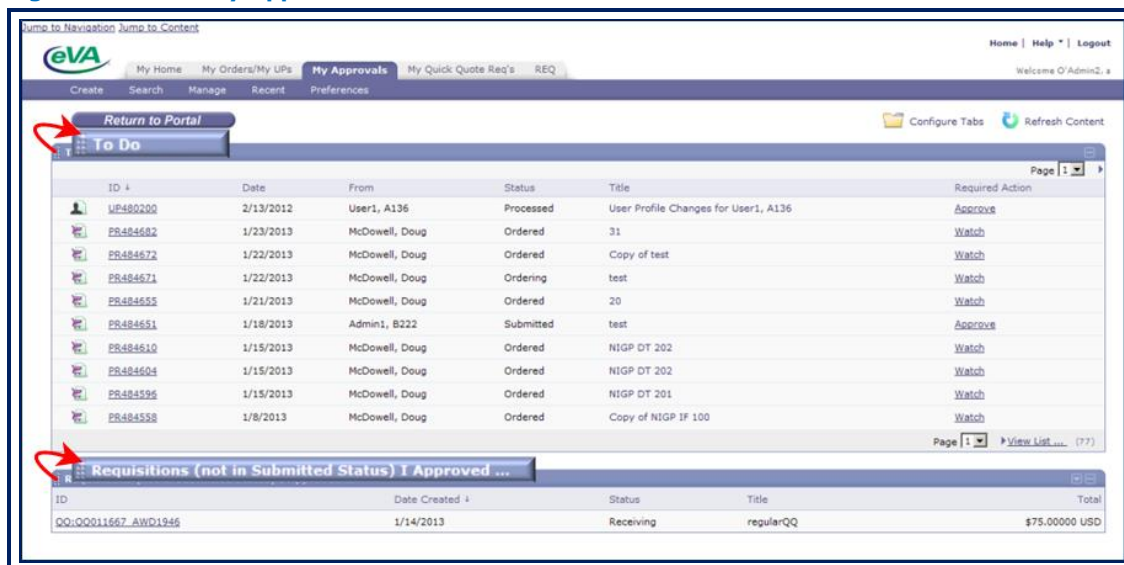
"MY APPROVALS" TAB

The **My Approvals** tab provides a convenient list of the requisitions that are awaiting your approval or for which you are a watcher (**To Do**), and a separate list of requisitions that you have approved but that are not in *Submitted* status, as shown in **Figure 24**. Other documents such as Quick Quote requests, user profiles, eForms, etcetera, also can be accessed from this tab when they are ready for approval.



TIP! If you do not see a request that you know is ready for approval, click the **Refresh Content** button, located in the top right corner of the screen, to make sure you are seeing the most up-to-date information.

Figure 24: The "My Approvals" Dashboard Tab



ID #	Date	From	Status	Title	Required Action
UP480200	2/13/2012	User1, A136	Processed	User Profile Changes for User1, A136	Approve
PR484682	1/23/2013	McDowell, Doug	Ordered	31	Watch
PR484672	1/22/2013	McDowell, Doug	Ordered	Copy of test	Watch
PR484671	1/22/2013	McDowell, Doug	Ordering	test	Watch
PR484655	1/21/2013	McDowell, Doug	Ordered	20	Watch
PR484651	1/18/2013	Admin1, B222	Submitted	test	Approve
PR484610	1/15/2013	McDowell, Doug	Ordered	NIGP DT 202	Watch
PR484604	1/15/2013	McDowell, Doug	Ordered	NIGP DT 202	Watch
PR484596	1/15/2013	McDowell, Doug	Ordered	NIGP DT 201	Watch
PR484558	1/8/2013	McDowell, Doug	Ordered	Copy of NIGP IF 100	Watch

ID	Date Created	Status	Title	Total
QQ:QQ011667_AWD1946	1/14/2013	Receiving	regularQQ	\$75.00000 USD

"MY QUICK QUOTE REQ'S" TAB

The eMall works in concert with the Quick Quote application. After submitting a vendor award for your Quick Quote, the status of your Quick Quote request changes to *Bids Opened* and an eMall requisition is created, usually within 30 minutes of the award submission.

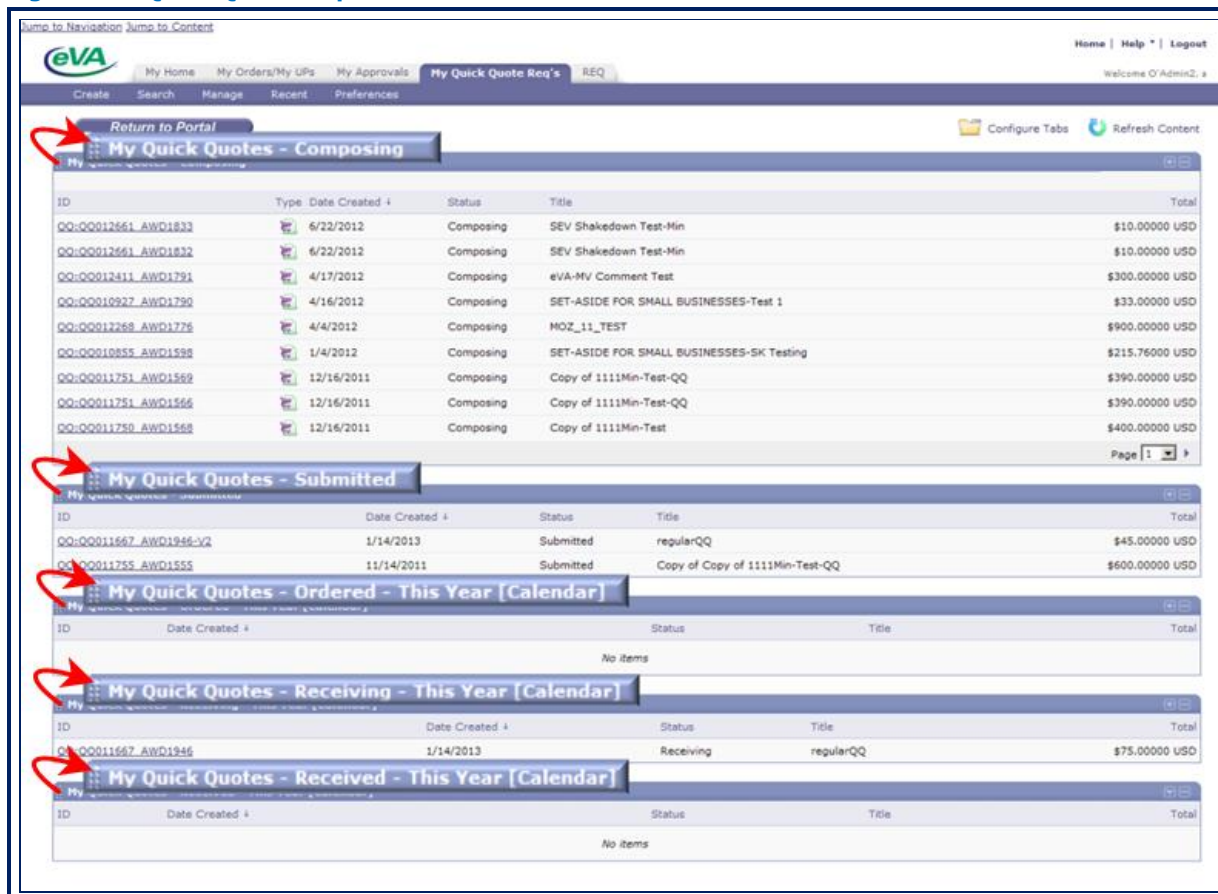
The eMall uses your **User Profile** values¹ to create the requisition, and assigns a requisition number that includes the Quick Quote Request ID and Award number.

¹ For more information about user profiles, see the *User Management Guide*.

USING THE DASHBOARD

You can track your Quick Quote requisitions from the **DASHBOARD**, where the **My Quick Quote Req's** tab displays your Quick Quote requisitions grouped by status, as shown in Figure 25.

Figure 25: Quick Quote Requisitions on the Dashboard



My Quick Quotes - Composing

ID	Type	Date Created	Status	Title	Total
QQ:QQ012661_AWD1833		6/22/2012	Composing	SEV Shakedown Test-Min	\$10.00000 USD
QQ:QQ012661_AWD1832		6/22/2012	Composing	SEV Shakedown Test-Min	\$10.00000 USD
QQ:QQ012611_AWD1791		4/17/2012	Composing	eVA-MV Comment Test	\$300.00000 USD
QQ:QQ010927_AWD1790		4/16/2012	Composing	SET-ASIDE FOR SMALL BUSINESSES-Test 1	\$33.00000 USD
QQ:QQ012268_AWD1776		4/4/2012	Composing	MOZ_11_TEST	\$900.00000 USD
QQ:QQ010855_AWD1598		1/4/2012	Composing	SET-ASIDE FOR SMALL BUSINESSES-SK Testing	\$215.76000 USD
QQ:QQ011751_AWD1569		12/16/2011	Composing	Copy of 1111Min-Test-QQ	\$390.00000 USD
QQ:QQ011751_AWD1566		12/16/2011	Composing	Copy of 1111Min-Test-QQ	\$390.00000 USD
QQ:QQ011750_AWD1568		12/16/2011	Composing	Copy of 1111Min-Test	\$400.00000 USD

My Quick Quotes - Submitted

ID	Date Created	Status	Title	Total
QQ:QQ011667_AWD1946-32	1/14/2013	Submitted	regularQQ	\$45.00000 USD
QQ:QQ011755_AWD1555	11/14/2011	Submitted	Copy of Copy of 1111Min-Test-QQ	\$600.00000 USD

My Quick Quotes - Ordered - This Year [Calendar]

No items

My Quick Quotes - Receiving - This Year [Calendar]

ID	Date Created	Status	Title	Total
QQ:QQ011667_AWD1946	1/14/2013	Receiving	regularQQ	\$75.00000 USD

My Quick Quotes - Received - This Year [Calendar]

No items

CONFIGURING DASHBOARD TABS

The eMall Dashboard is easily customized using the **Configure Tabs** menu (Figure 26). This menu contains two kinds of configuration commands:

- Commands that effect changes on the current tab only, and
- Commands that effect changes on the entire tab set.

This menu lets you control the content that is displayed on each tab, as well as the order in which that content is presented. **Table 5** explains each of the **Configure Tabs** menu options.

Figure 26: Click the “Configure Tabs” Icon to Display Menu

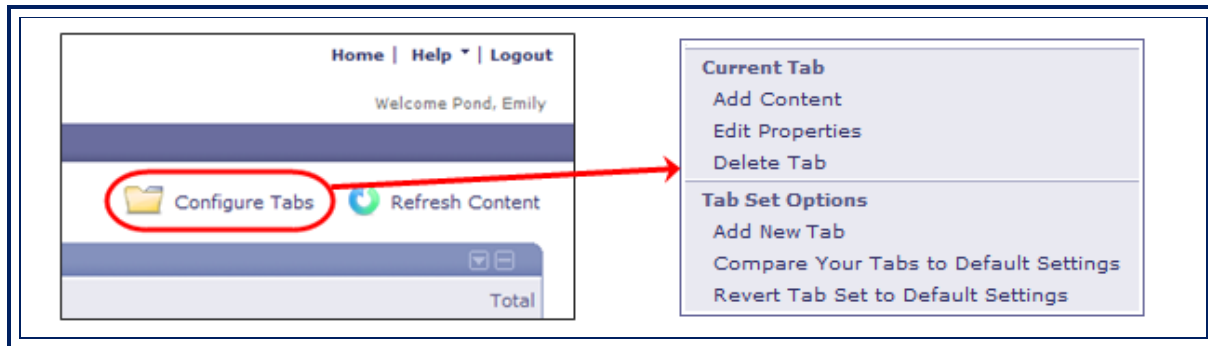

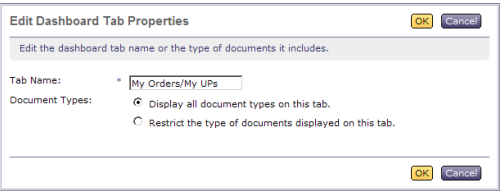


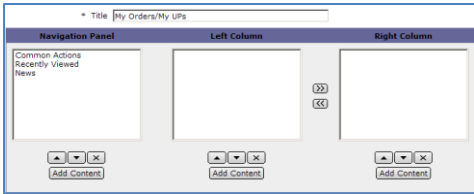
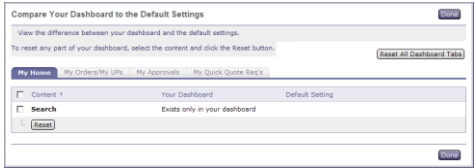
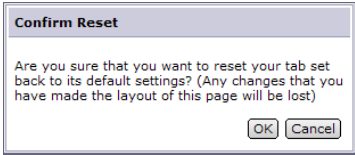


Table 5: Dashboard Configure Tabs Menu

Command	Example	Function
Current Tab		
Add Content		The Add Content menu displays a list of available content categories. Select the desired content right on the menu list and drag it onto the dashboard.
Edit Properties		The Edit Dashboard Tab Properties dialog box allows you to: <ul style="list-style-type: none"> • Change the name of the active tab • Determine the document types that will be displayed on that tab
Delete Tab		The Delete Tab command causes the active tab to be deleted. <p>IMPORTANT NOTE: There is no confirmation prompt; the tab will be deleted as soon as you click Delete Tab. This action cannot be undone; you must recreate the tab if you change your mind.</p>

Command	Example	Function
Tab Set Options		
Add New Tab		Use this command to add a new, blank tab to your dashboard.
Rearrange Tab Content		Click Rearrange Tab Content to open a dialog box that allows you to move, add, or delete content from the active tab.
Compare Your Tabs to Default Settings		<p>This command opens a dialog box that allows you to:</p> <ul style="list-style-type: none"> • Compare your dashboard tabs to the default settings • Restore the default settings on any or all tabs.
Revert Tab Set to Default Settings		<p>When you click the <i>Revert Tab Set</i> command, a confirmation prompt is displayed.</p> <p>Click OK to return all of your tabs to their default settings, or Cancel to retain your changes.</p>

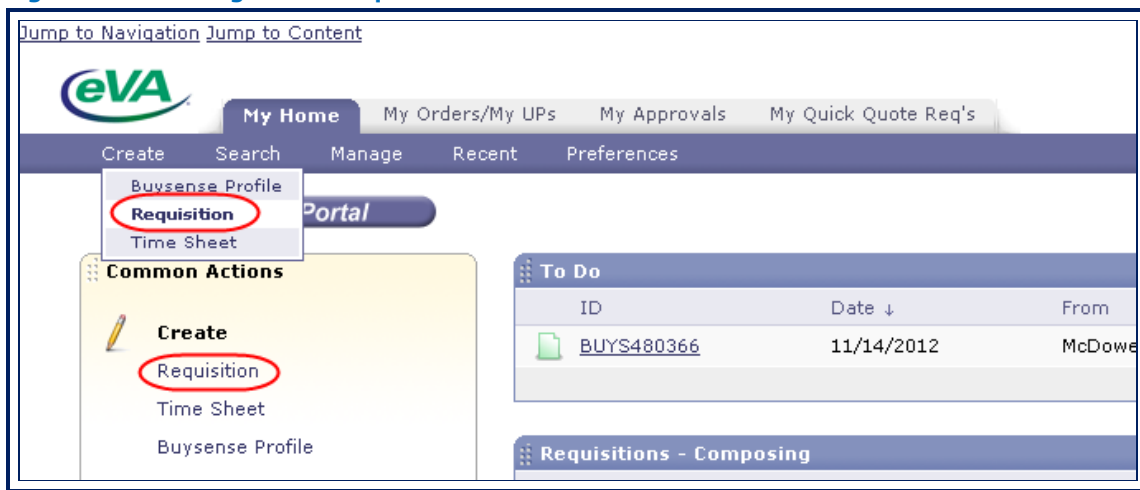
6. CREATING A PURCHASE REQUISITION

This section takes you through the steps for creating a basic requisition. For detailed information about how to find items you need in the eMall and add them to your requisition, see [Searching the eMall](#).

There are two ways to create a new requisition in the eMall (**Figure 27**):

- From any tab on the Command Bar, open the **Create** menu and click *Requisition*; or
- From the **My Home** tab, click *Requisition* in the **Common Actions** window on the left navigation panel.

Figure 27: Creating A New Requisition

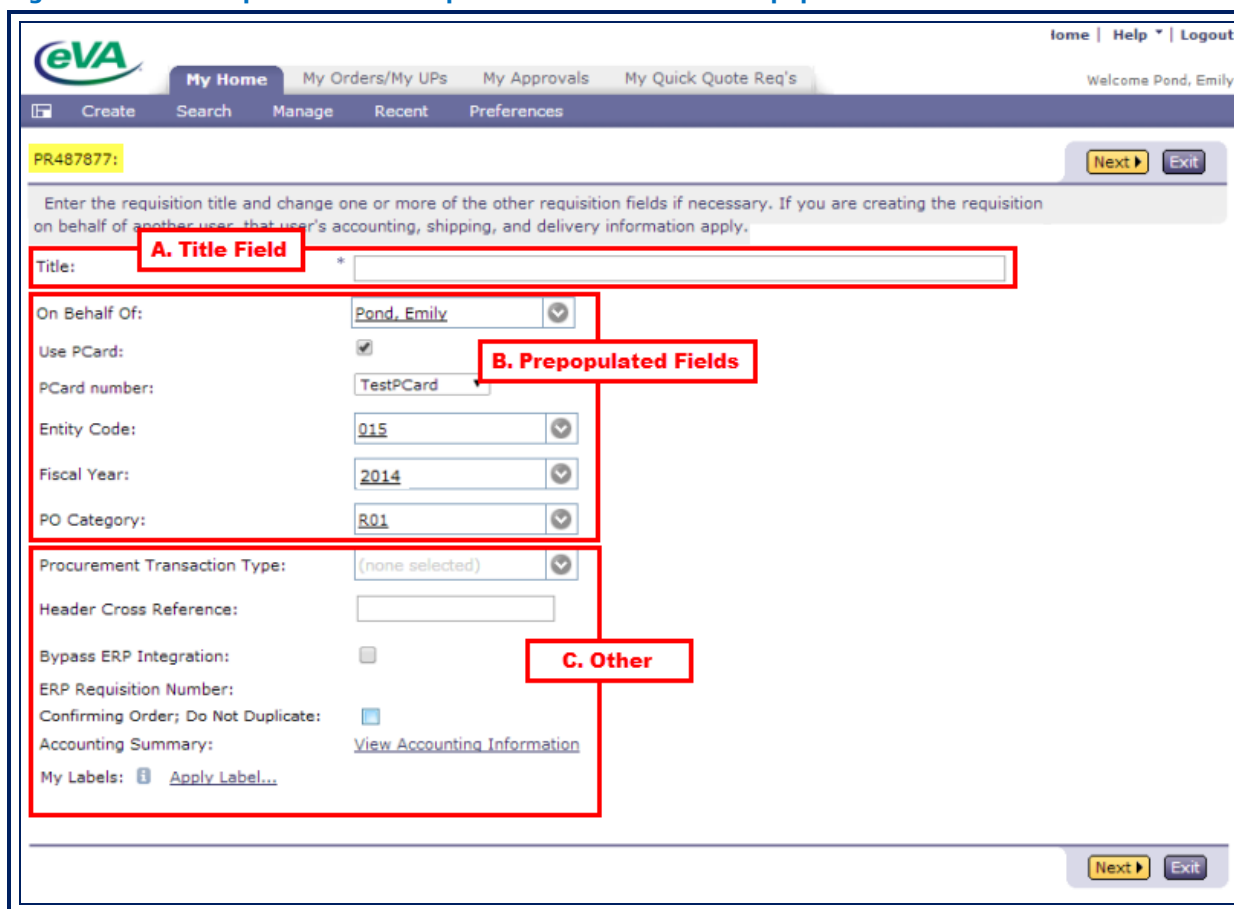


THE REQUISITION TITLE SCREEN

When you create a new requisition, Ariba assigns a unique **Requisition Number**, which is displayed near the top of the **REQUISITION TITLE** screen (Figure 28).

The **REQUISITION TITLE** screen contains a number of data fields. In some of these fields, you will enter appropriate data as needed for each new requisition. Others will have been auto-populated with previously stored data determined by your buysenseOrg (BSO). (BSO refers to the division/department within a client.)

Figure 28: New Requisition with Requisition Number and Auto-populated Fields



The screenshot shows the 'New Requisition' screen in the eVA system. The requisition number 'PR487877' is displayed at the top left. The screen is divided into several sections, with red boxes and labels identifying specific areas:

- A. Title Field:** A red box highlights the 'Title:' text input field at the top of the form.
- B. Prepopulated Fields:** A red box highlights a group of fields including 'On Behalf Of' (Pond, Emily), 'Use PCard' (checked), 'PCard number' (TestPCard), 'Entity Code' (015), 'Fiscal Year' (2014), and 'PO Category' (R01).
- C. Other:** A red box highlights the bottom section of the form, including 'Procurement Transaction Type' (none selected), 'Header Cross Reference', 'Bypass ERP Integration' (unchecked), 'ERP Requisition Number', 'Confirming Order; Do Not Duplicate' (checked), 'Accounting Summary' (View Accounting Information), and 'My Labels' (Apply Label...).

The top navigation bar includes links for 'Home', 'Help', and 'Logout'. The main navigation bar includes 'My Home', 'My Orders/My UPs', 'My Approvals', and 'My Quick Quote Req's'. The bottom navigation bar includes 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The bottom right corner has 'Next' and 'Exit' buttons.

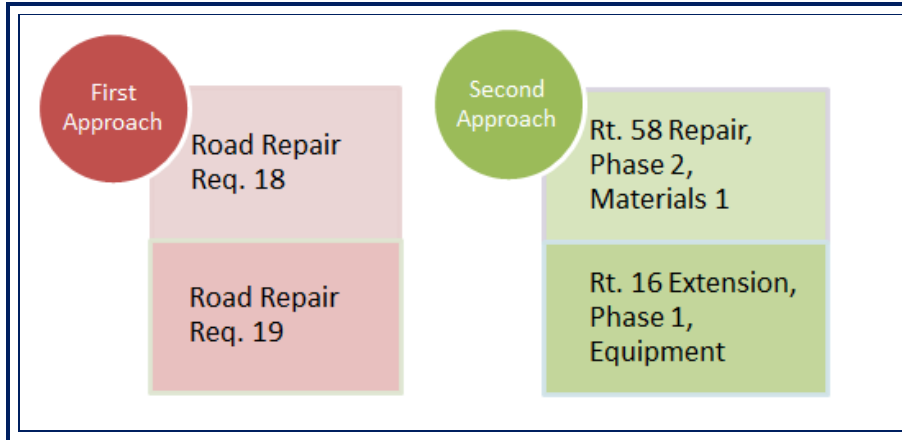
The **REQUISITION TITLE** screen is your starting point for any requisition that originates in the eMall. The sections below provide information about this screen's data fields.

A TITLE (TEXT BOX)

When you create a new requisition, you must give it a title. The title need not be unique, because the Requisition Number is always unique. However, it is a good idea to assign a title that provides some indication of the contents of the request, in case you need to refer to it in the future. Audit and accounting needs aside, the ability to copy an existing requisition and adapt it for a similar project can be a real time saver.

Suppose, for example, that your job is to procure materials and equipment for road maintenance. Now, look at **Figure 29** to see two different approaches to assigning requisition titles.

Figure 29: Assigning Requisition Titles



The first approach to assigning requisition titles virtually guarantees a long and tedious search to find any particular requisition. These titles do not contain any information that can help to differentiate among them; you would have to open each requisition and look at the line items to find the one you want.

The second approach can help to ensure a more positive outcome, because each title contains several searchable terms. You can search by location, type of work, project phase, or procurement type. The few seconds you spend creating a strong title for your requisition will pay dividends when your searches produce fast, reliable results.

B PREPOPULATED FIELDS

If you need to change the data in a prepopulated field, click the down arrow on the drop-down list (**Table 4**) to select or search for a different value.

- **On Behalf Of (Drop-down List):** When you create a new requisition, your user name will automatically appear in the **On Behalf Of** text box. If you are completing the requisition for someone else, you must change the value in this field to reflect that fact. The screen will automatically refresh, inserting the new Requester's accounting, shipping, and approval flow information. When you submit the requisition, eVA will notify the Requester by email.
- **Use PCard (Check Box):** If you are approved to use your organization's Purchase Card (AMEX, Visa, or MasterCard), the **Use PCard** check box will be automatically selected. To order without using a PCard, click the **Use PCard** check box to remove the check mark; the resulting order will not contain PCard information.
- **PCard Number (Pick List, Conditional):** The information in this field is the custom PCard alias information the user set up when entering PCard data. The **PCard Number** pick list is a conditional field. The condition is met when the user whose name appears in the **On Behalf Of** field has access to more than one PCard; otherwise, this field will not be available.

CREATING A PURCHASE REQUISITION

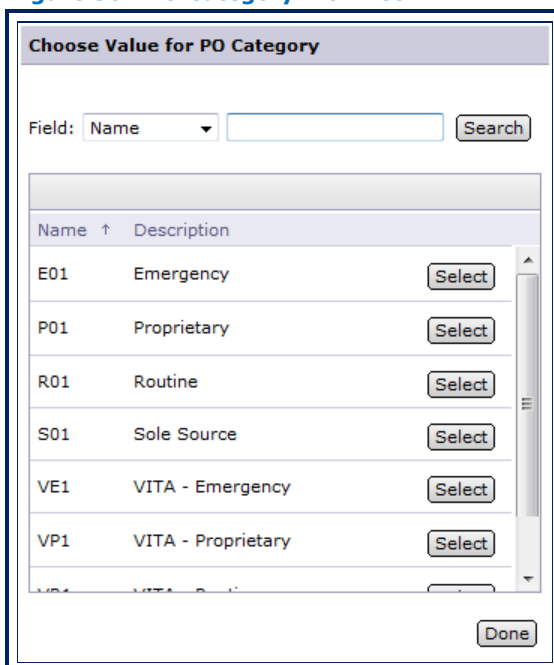
If the **PCard Number** pick list is available when you create a PCard requisition, be sure the appropriate PCard alias is selected.

- **Entity/SubEntity Code (Drop-down List):** An Entity Code is a unique ID number that eVA assigns to each agency/entity. It is included with the data stored for each eMall-originated requisition for tracking and reporting purposes. Some organizations track requisitions by department or by subsidiary. Sub-entity codes provide the required level of granularity in these cases.

When you create a new requisition, all applicable Entity and Sub-entity codes will be available for selection.

- **Fiscal Year (Drop-down List):** The current fiscal year is automatically displayed. Use the drop-down list to choose a different year.
- **PO Category (Drop-down List):** The **PO Category** defines the purchase order type; for example, sole source or proprietary, routine or emergency. If you click the arrow to expand the drop-down list and select *Search for more ...*, you will see the complete list of PO Categories. **Figure 30** provides a partial view of that pick list.

Figure 30: PO Category Pick List



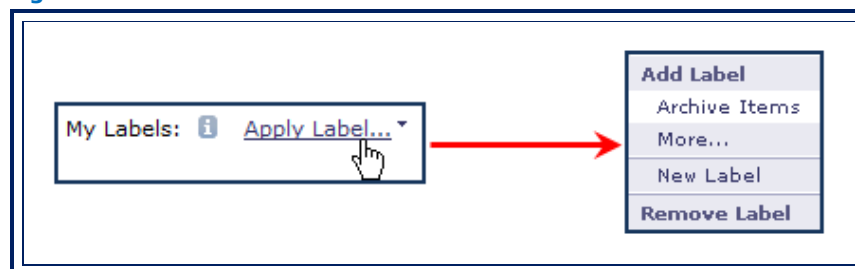
Name	Description
E01	Emergency
P01	Proprietary
R01	Routine
S01	Sole Source
VE1	VITA - Emergency
VP1	VITA - Proprietary

PO Category designations generally end with the numeral 1, as shown above; however, depending on your agency/entity, you might also have access to PO Category X02. The X02 category is used exclusively to identify eVA-excluded procurement transactions and non-procurement (payment) transactions that have been created in eVA. Use of the X02 category allows the agency to report, track, and analyze all its transactions in one place. eVA orders that carry the X02 designation will be exempt from eVA agency and vendor transaction fees.

C OTHER

- **Procurement Transaction Type (Drop-down List):** Choose the value that best represents the category of goods or services you are requesting. Click *Search for more...* from the **Procurement Transaction Type** drop-down list to see a dialog box that displays the value and the description of each transaction type.
- **Header Cross-Reference (Text Box):** If your agency/entity assigns its own requisition number, this field can be used to display that number. (This field is used at the discretion of each agency/entity.)
- **Bypass ERP Integration (Check Box):** This check box is used only by agencies/entities that are set up for Integration. Users can check this box to bypass the agency's ERP system, but only under specific circumstances..
- **ERP Requisition Number (Text Box):** Agencies/entities that use ERPs can choose to display the ERP requisition number in this field on orders imported into eVA.
- **Confirming Order; Do Not Duplicate (Text Box):** When selected, a message that reads "Confirming Order – Do Not Duplicate" is added to the **Comments** box.
- **Accounting Summary: View Accounting Information (Link):** Click this link to access a read-only accounting information summary for the requisition. The summary will display only after items are entered on the requisition.
- **My Labels:** You can add labels when you create or edit a requisition. Labels provide additional means of locating a specific document or group of documents when you conduct a system search. Click the Apply Label link to select an existing label or create a new one (Figure 31).

Figure 31: Add or Remove Labels




WHEN you have added all necessary information on this screen, click **Next** to continue.

ADDING ITEMS

This section explains how to add items to your shopping cart from the various sources available to you. If you need detailed instructions on how to search for items, see Section 7, [Searching the eMall](#). There are several ways to add items to a requisition:

- Select from one of the many supplier-provided [catalogs](#).
- Enter an item as a [non-catalog item](#) (not selected from an electronic catalog).
- Select an item that you previously saved as a [favorite](#).
- Select an item from a [search](#) that you have saved.



TIP: After items have been added to your shopping cart, you can select the [Shopping Cart](#) link or icon  to view a summary of the shopping cart contents.

ADDING CATALOG ITEMS

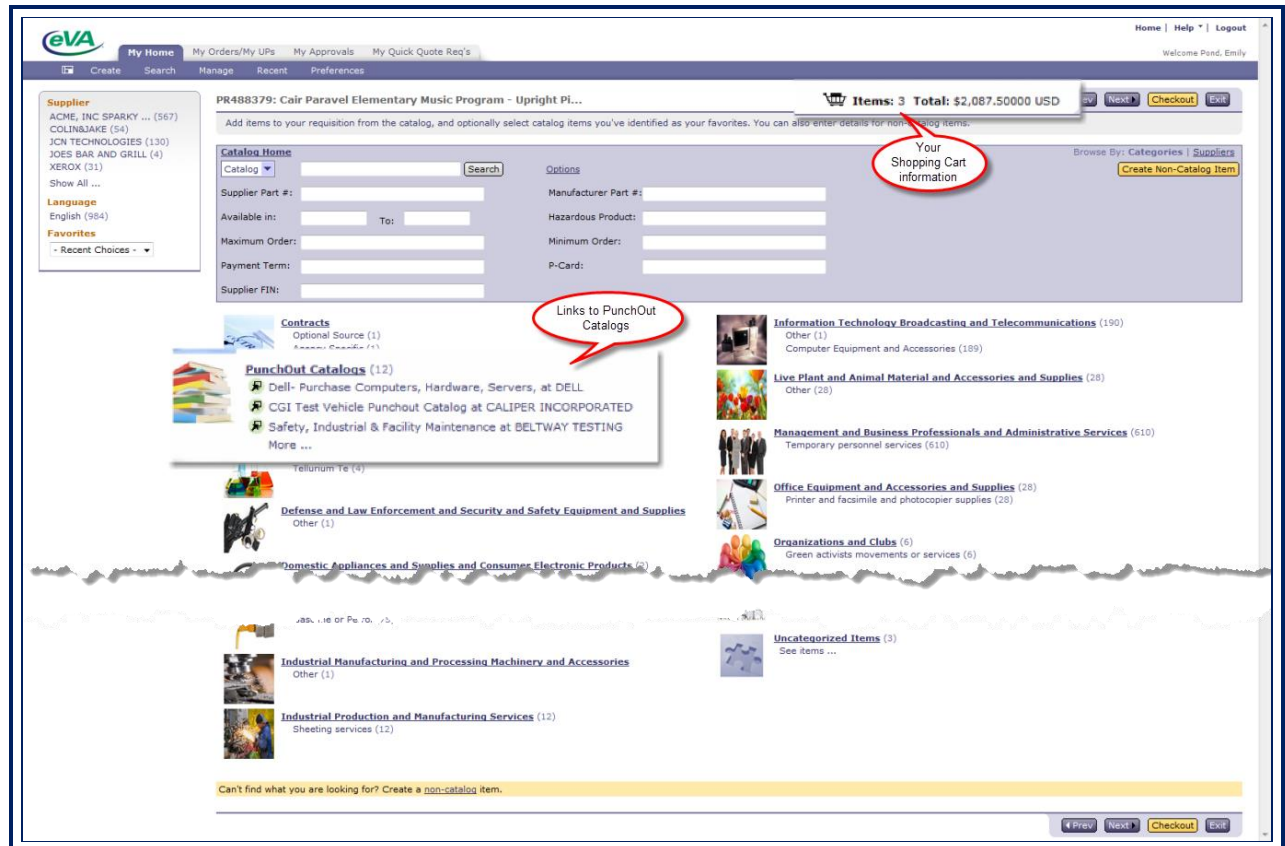
There are two types of eVA catalogs: hosted and PunchOut.

- A hosted catalog, in the context of the eMall, is one that is “built in” to the eMall. In addition to the item details that are returned with the results list, each item from a hosted catalog displays an **Add to Cart** button.
- A PunchOut catalog makes it possible for you to access the supplier’s own on-line catalog to find and select items while the eMall keeps track of what you are doing and produces the actual requisition.

Both can be accessed from the **CATALOG HOME** screen (Figure 32). The procedure for adding an item to your requisition depends on whether the item is from a hosted catalog or a PunchOut catalog.

Not all vendors have catalogs. If you search by vendor and no results are returned (and you have checked the spelling), it means that vendor does not have a catalog.

Figure 32: Catalog Home Screen



When you search for an item, the eMall returns a list of items that match your search terms (the "results list"). The results list displays the name of the supplier for each item, along with the description, price, SWaM qualification, availability, and other details.

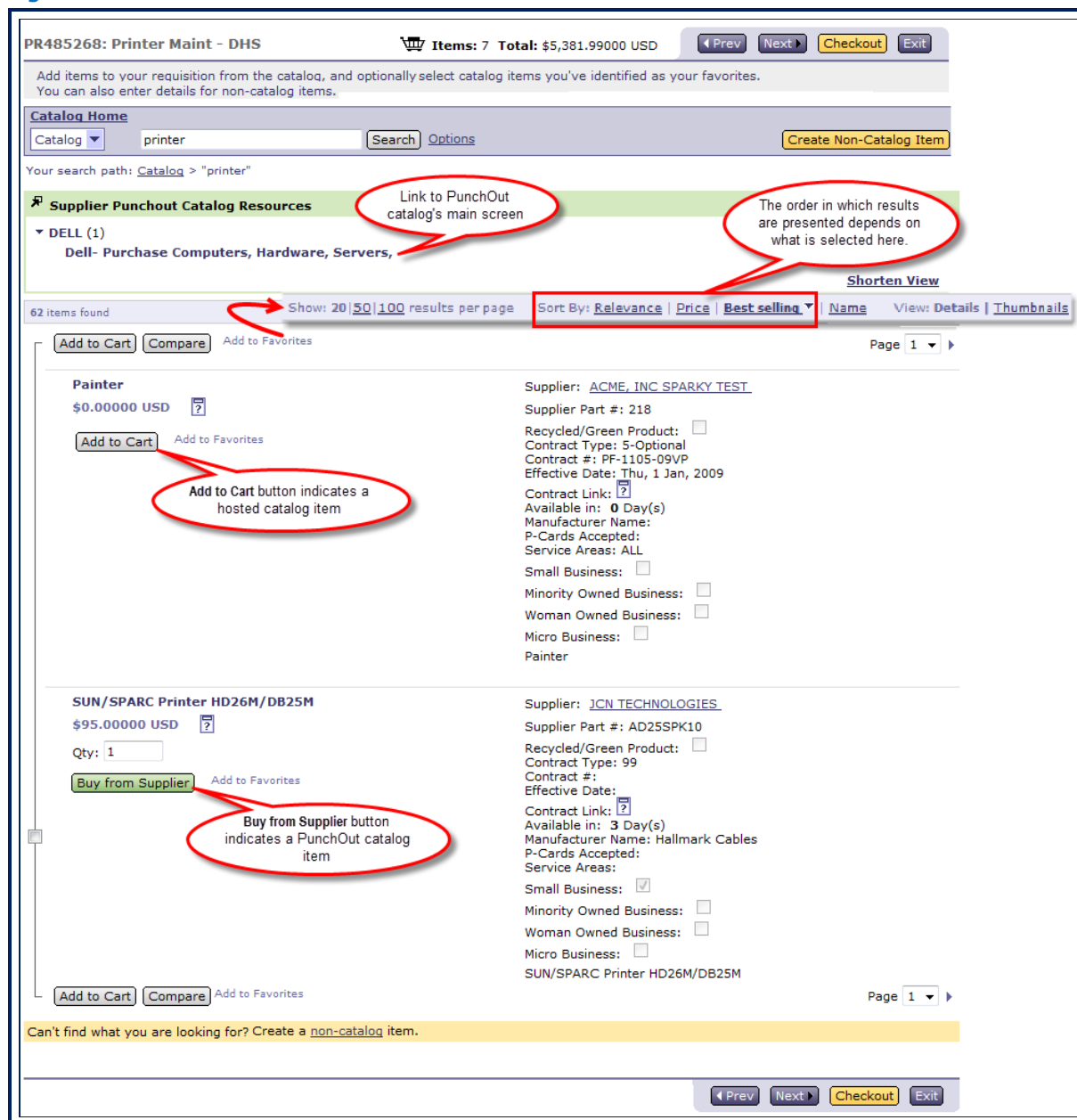
CREATING A PURCHASE REQUISITION

Figure 33 shows typical search results, where the search term 'printer' returns items from both hosted and PunchOut catalogs. Figure 33 also shows the standard display options, indicated by the red arrow. Using these options, you can control:

- How many results are displayed per page (20, 50, or 100).
- The sort order for your results (by Relevance, Price, Bestselling, or Name).
- The view (details as shown in Figure 33, or thumbnails as shown in Figure 34).

You will find the same display options in your shopping cart and Favorites folders.

Figure 33: Search Results – List View



The screenshot displays the search results for 'printer' in the eMALL system. The page header shows the requisition number 'PR485268: Printer Maint - DHS', the number of items '7', and the total price '\$5,381.99000 USD'. Navigation buttons include 'Prev', 'Next', 'Checkout', and 'Exit'.

The search bar shows the search term 'printer' and a 'Search' button. Below the search bar, the search path is 'Catalog > "printer"'. The 'Supplier Punchout Catalog Resources' section lists 'DELL (1)' with a link to 'Dell- Purchase Computers, Hardware, Servers,'. A red circle highlights this link with the text 'Link to PunchOut catalog's main screen'.

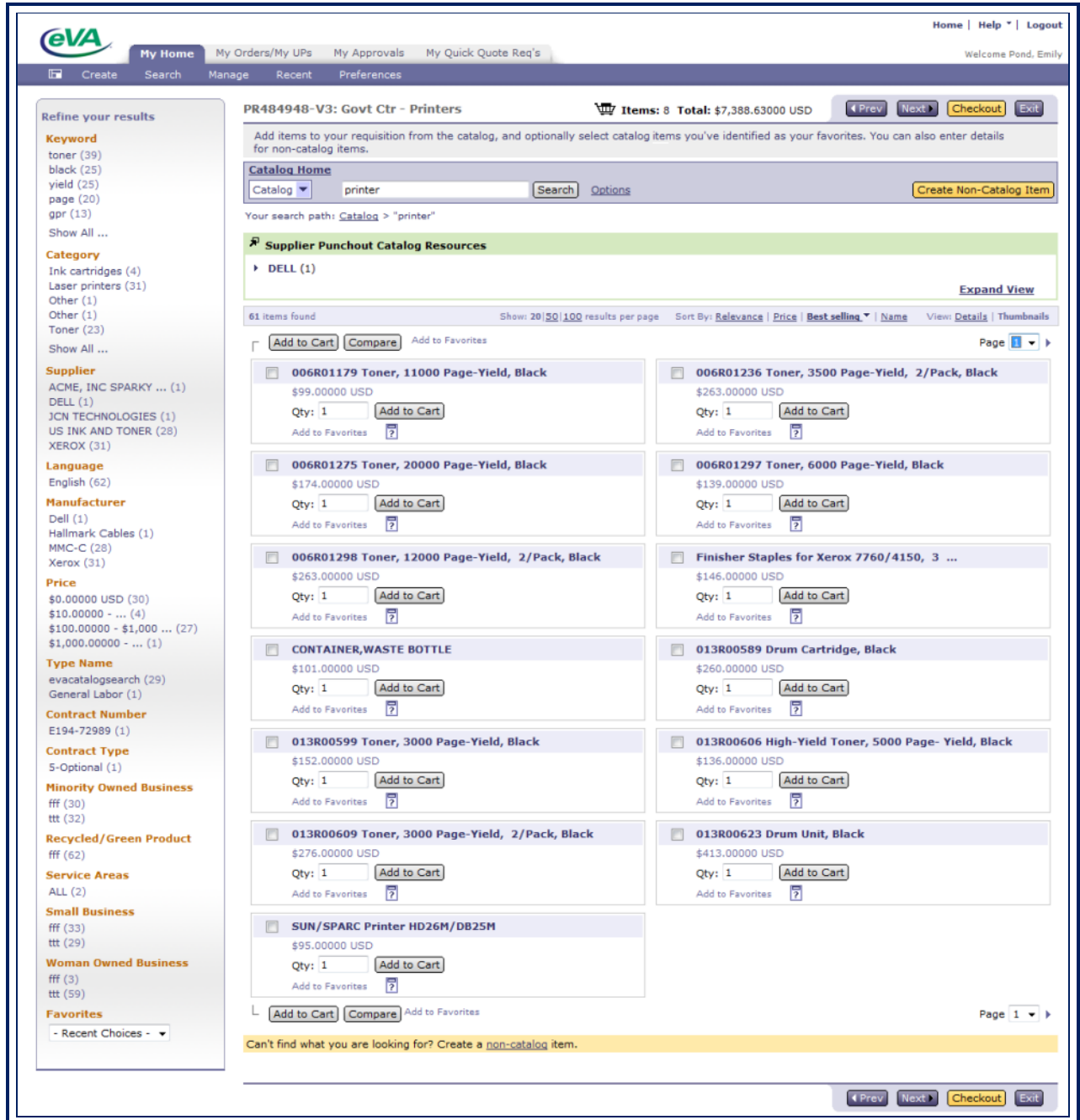
The search results are displayed in a list view. The 'Shorten View' section shows '62 items found' and 'Show: 20 | 50 | 100 results per page'. A red arrow points to the 'Show: 20 | 50 | 100 results per page' dropdown menu with the text 'The order in which results are presented depends on what is selected here.' The 'Sort By' dropdown is set to 'Relevance', and the 'View' dropdown is set to 'Details'.

The first result is a 'Painter' from 'ACME, INC SPARKY TEST' with a price of '\$0.00000 USD'. The 'Add to Cart' button is highlighted with a red circle and the text 'Add to Cart button indicates a hosted catalog item'. The 'Buy from Supplier' button is also visible.

The second result is a 'SUN/SPARC Printer HD26M/DB25M' from 'JCN TECHNOLOGIES' with a price of '\$95.00000 USD'. The 'Buy from Supplier' button is highlighted with a red circle and the text 'Buy from Supplier button indicates a PunchOut catalog item'.

The page footer includes a message 'Can't find what you are looking for? Create a non-catalog item.' and navigation buttons 'Prev', 'Next', 'Checkout', and 'Exit'.

Figure 34: Search Results – Thumbnail View



The screenshot displays the eMALL search results interface. At the top, the navigation bar includes the eVA logo, user links (Home, Help, Logout), and a welcome message. Below this, a secondary navigation bar shows tabs for 'My Home', 'My Orders/My UPS', 'My Approvals', and 'My Quick Quote Req's'. The main header area displays the search title 'PR484948-V3: Govt Ctr - Printers', the number of items (8), and the total price (\$7,388.63000 USD). A search bar shows the query 'printer' and a 'Search' button. The left sidebar provides various filters to refine the search results, including Keyword, Category, Supplier, Language, Manufacturer, Price, Type Name, Contract Number, Contract Type, Minority Owned Business, Recycled/Green Product, Service Areas, Small Business, Woman Owned Business, and Favorites. The main content area shows a list of 61 items found, with a 'Show: 20 | 50 | 100 results per page' option. The items are displayed in a grid format, each with a checkbox, a description, a price, a quantity selector, and an 'Add to Cart' button. The items include various toner cartridges (e.g., 006R01179, 006R01236, 006R01275, 006R01297, 006R01298, 013R00599, 013R00609, 013R00606, 013R00623) and a printer (SUN/SPARC Printer HD26M/DB25M). The bottom of the page features a 'Can't find what you are looking for? Create a non-catalog item.' link and a 'Page 1' indicator.

Hosted Catalogs

Click the **Add to Cart** button next to an item to place it in your shopping cart. If, after placing the item in your shopping cart, you need to modify your selection, you can make changes to hosted catalog items right in your eMall shopping cart.

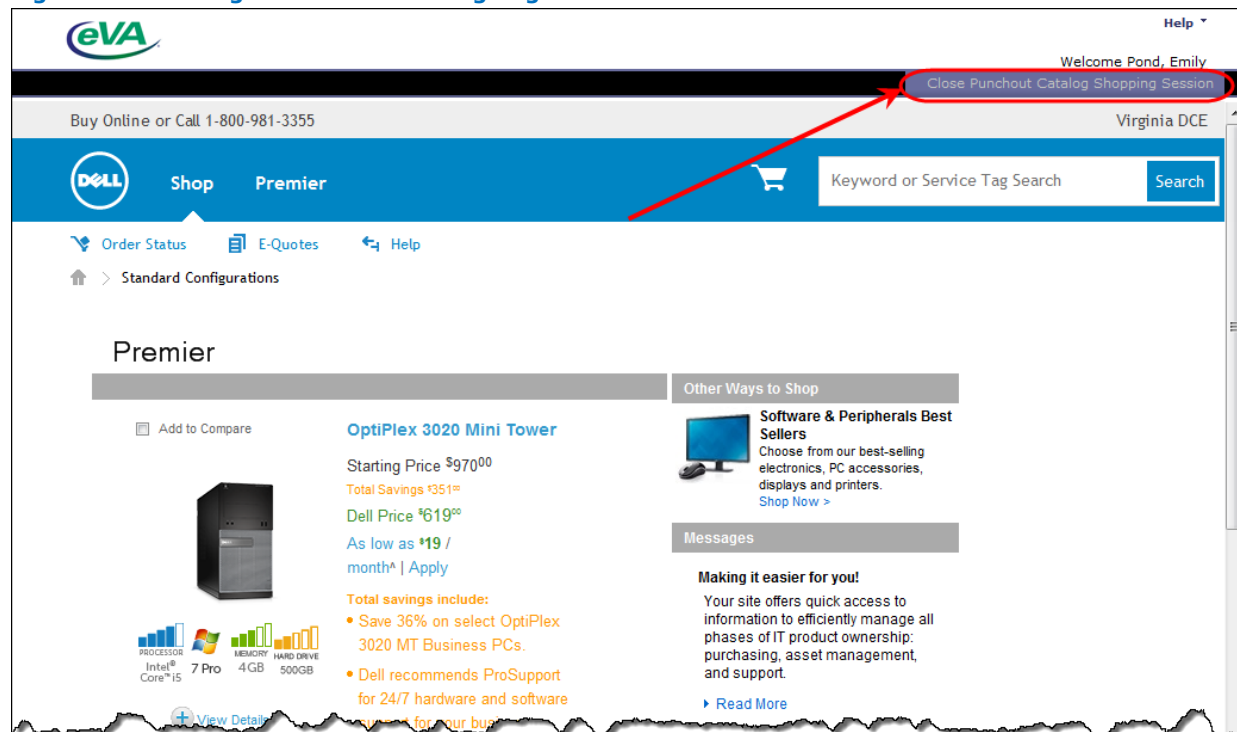
CREATING A PURCHASE REQUISITION

PunchOut Catalogs

Use the PunchOut catalog links on the **CATALOG HOME** screen (Figure 32) to navigate to a PunchOut catalog, or click the **Buy from Supplier** button next to the item you want in the search results list (Figure 33).

When you access a PunchOut catalog, the eVA logo is present in the upper left corner of your screen, and your user name appears in the upper right corner. Everything else you see on the screen is presented by the supplier (Figure 35).

Figure 35: Viewing a PunchOut Catalog Page

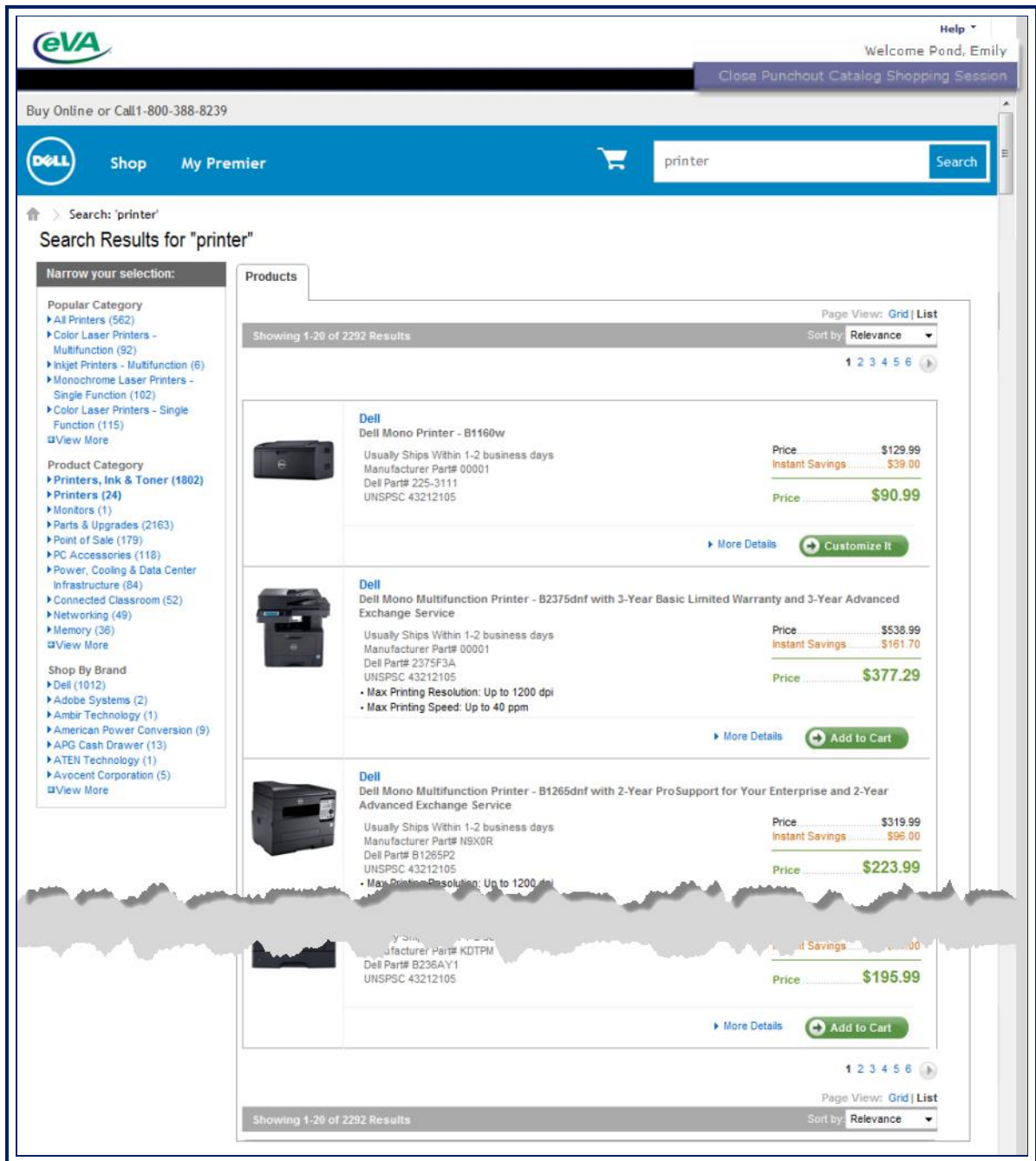


Search for items in the PunchOut catalog and add them to your shopping cart, just as you would on any internet shopping site. If you decide not to make a purchase, you can return to the eMall at any time by clicking the [Close Punchout Catalog Shopping Session](#) link in the upper left corner of the screen.



WARNING! Although it might appear that you are creating your order at the supplier's website, the supplier **will not** receive an order until you complete and submit the eVA eMall requisition and obtain any necessary approvals.

Figure 36: Search Results List in a PunchOut Catalog



The screenshot shows a web interface for a PunchOut catalog. At the top, there's a header with the eVA logo, a welcome message 'Welcome Pond, Emily', and a 'Close Punchout Catalog Shopping Session' button. Below this is a navigation bar with 'Dell', 'Shop', and 'My Premier' links, along with a search bar containing the word 'printer' and a 'Search' button. The main content area is titled 'Search Results for "printer"' and shows a list of products. On the left, there's a sidebar with 'Narrow your selection:' and various category filters like 'Popular Category' and 'Product Category'. The product list on the right shows three Dell printers with their respective prices, instant savings, and part numbers. Each product entry includes a 'More Details' link and an 'Add to Cart' button. The page also displays 'Showing 1-20 of 2292 Results' and 'Page View: Grid | List' options.

Search Results for "printer"

Narrow your selection:

- Popular Category
 - All Printers (562)
 - Color Laser Printers - Multifunction (92)
 - Inkjet Printers - Multifunction (6)
 - Monochrome Laser Printers - Single Function (102)
 - Color Laser Printers - Single Function (115)
 - View More
- Product Category
 - Printers, Ink & Toner (1802)
 - Printers (24)
 - Monitors (1)
 - Parts & Upgrades (2163)
 - Point of Sale (179)
 - PC Accessories (118)
 - Power, Cooling & Data Center Infrastructure (84)
 - Connected Classroom (52)
 - Networking (49)
 - Memory (36)
 - View More
- Shop By Brand
 - Dell (1012)
 - Adobe Systems (2)
 - Ambr Technology (1)
 - American Power Conversion (9)
 - APG Cash Drawer (13)
 - ATEN Technology (1)
 - Avocent Corporation (5)
 - View More

Products

Showing 1-20 of 2292 Results

Sort by: Relevance

1 2 3 4 5 6

Dell
Dell Mono Printer - B1160w
Usually Ships Within 1-2 business days
Manufacturer Part# 00001
Dell Part# 225-3111
UNSPSC 43212105
Price \$129.99
Instant Savings \$39.00
Price **\$90.99**
More Details Customize It

Dell
Dell Mono Multifunction Printer - B2375dnf with 3-Year Basic Limited Warranty and 3-Year Advanced Exchange Service
Usually Ships Within 1-2 business days
Manufacturer Part# 00001
Dell Part# 2375F3A
UNSPSC 43212105
• Max Printing Resolution: Up to 1200 dpi
• Max Printing Speed: Up to 40 ppm
Price \$538.99
Instant Savings \$161.70
Price **\$377.29**
More Details Add to Cart

Dell
Dell Mono Multifunction Printer - B1265dnf with 2-Year ProSupport for Your Enterprise and 2-Year Advanced Exchange Service
Usually Ships Within 1-2 business days
Manufacturer Part# NSX0R
Dell Part# B1265P2
UNSPSC 43212105
• Max Printing Resolution: Up to 1200 dpi
Price \$319.99
Instant Savings \$96.00
Price **\$223.99**
More Details Add to Cart

Showing 1-20 of 2292 Results

Page View: Grid | List

Sort by: Relevance

1 2 3 4 5 6

After making your selections, go through the checkout procedures at the PunchOut catalog website. Because PunchOut catalog websites belong to the suppliers, checkout procedures may vary somewhat from one to another.

CREATING A PURCHASE REQUISITION

When you finish checking out (for example, by clicking the **Create Order Requisition** button as shown in **Figure 37**), the items from the PunchOut catalog will automatically populate your eMall shopping cart.

Figure 37: PunchOut Catalog Shopping Cart

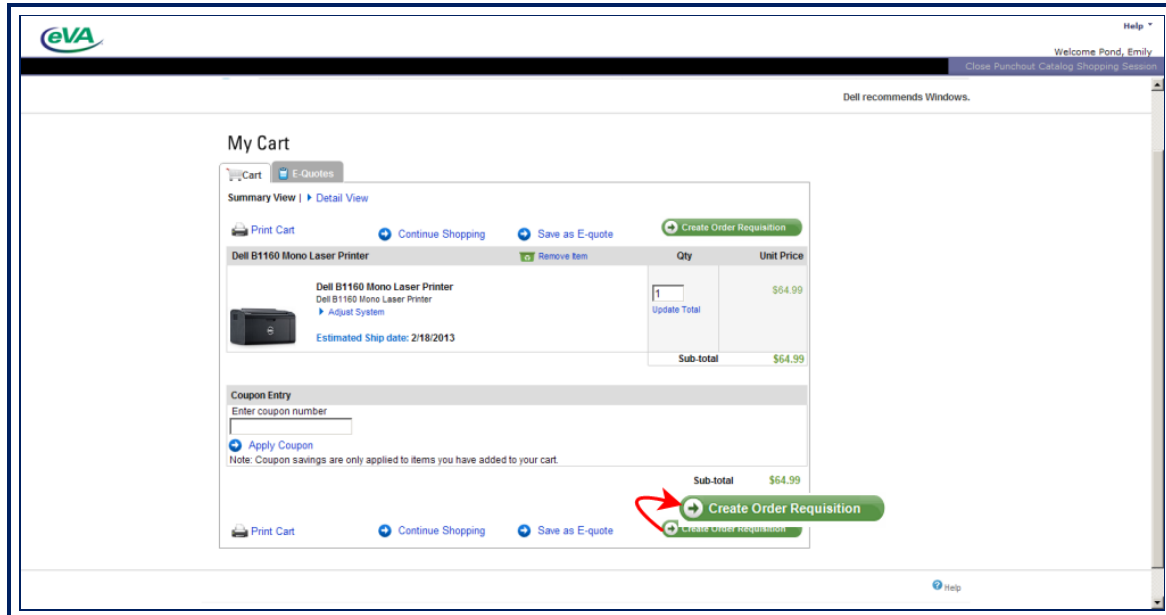
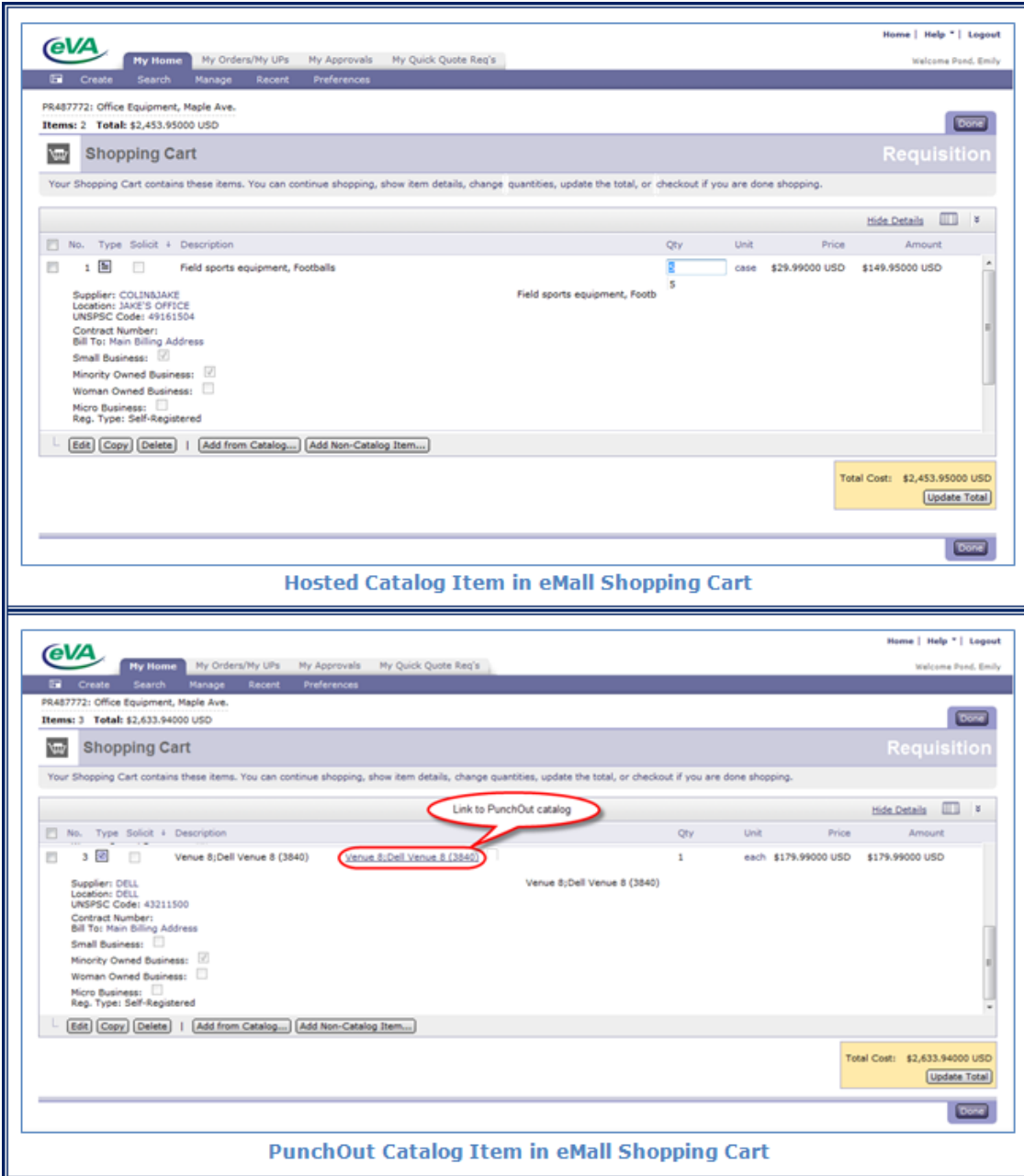


Figure 38 compares a hosted catalog item in your eVA shopping cart to a PunchOut catalog item. The PunchOut catalog item includes a link back to its listing in the PunchOut catalog. This is because, with one exception, you cannot make adjustments to a PunchOut catalog item in the eMall. Instead, you must use the provided link to return to the PunchOut catalog in order to make any necessary changes (such as quantity or features).

Figure 38: Hosted and PunchOut Catalog Items in eVA Shopping Cart



The figure consists of two screenshots of the eVA shopping cart interface, illustrating the difference between a hosted catalog item and a PunchOut catalog item.

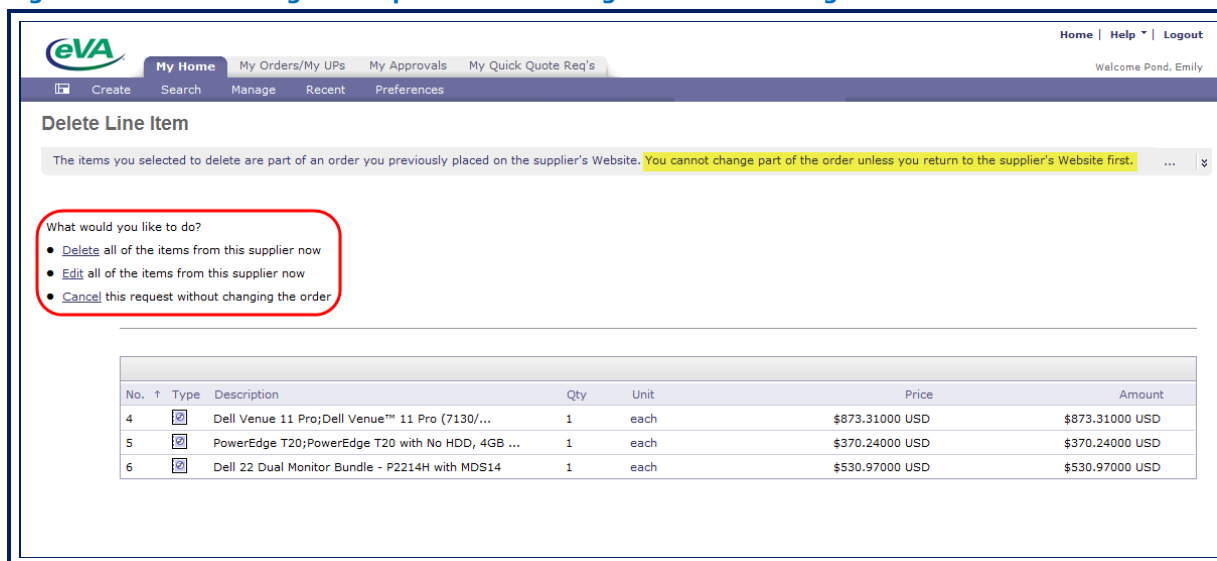
Hosted Catalog Item in eMall Shopping Cart: The top screenshot shows a shopping cart with one item: "Field sports equipment, Footballs". The item details include the supplier "COLINSJAKE", location "JAKE'S OFFICE", UNSPSC Code "49161504", and contract number. The quantity is 5, and the total cost is \$2,453,950.00 USD. The interface includes buttons for "Edit", "Copy", "Delete", "Add from Catalog...", and "Add Non-Catalog Item...".

PunchOut Catalog Item in eMall Shopping Cart: The bottom screenshot shows a shopping cart with one item: "Venue 8; Dell Venue 8 (3840)". The item details include the supplier "DELL", location "DELL", UNSPSC Code "43211500", and contract number. The quantity is 1, and the total cost is \$2,633,940.00 USD. A red circle highlights the item name "Venue 8; Dell Venue 8 (3840)", and a red arrow points to a link labeled "Link to PunchOut catalog" above the item details.

CREATING A PURCHASE REQUISITION

The exception noted above applies to deletions. You can delete PunchOut catalog items directly from your eMall shopping cart, provided you delete all items selected from the same PunchOut catalog. If you try to delete fewer than all of the line items from a PunchOut catalog, you will see an error message, along with a list of possible actions (Figure 39).

Figure 39: Error Message and Options for Deleting PunchOut Catalog Items



The screenshot shows the eMall interface with the 'Delete Line Item' page. A message states: 'The items you selected to delete are part of an order you previously placed on the supplier's Website. You cannot change part of the order unless you return to the supplier's Website first.' Below this, a red box highlights the question 'What would you like to do?' with three options: 'Delete all of the items from this supplier now', 'Edit all of the items from this supplier now', and 'Cancel this request without changing the order'. Below the options is a table of items.

No.	Type	Description	Qty	Unit	Price	Amount
4	<input checked="" type="checkbox"/>	Dell Venue 11 Pro;Dell Venue™ 11 Pro (7130/...	1	each	\$873.31000 USD	\$873.31000 USD
5	<input checked="" type="checkbox"/>	PowerEdge T20;PowerEdge T20 with No HDD, 4GB ...	1	each	\$370.24000 USD	\$370.24000 USD
6	<input checked="" type="checkbox"/>	Dell 22 Dual Monitor Bundle - P2214H with MDS14	1	each	\$530.97000 USD	\$530.97000 USD

ADDING NON-CATALOG ITEMS

If you need an article or service that is not found in a catalog, you can enter a non-catalog request.

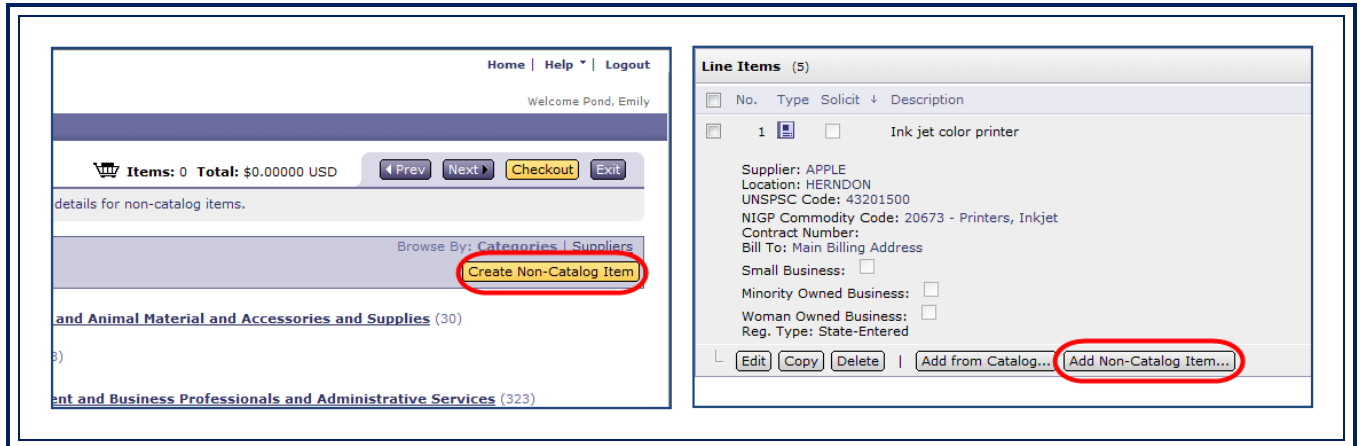
Creating a Non-Catalog Item

You might need to create a non-catalog item if:

- None of the existing catalogs offer the item you want to purchase, or
- You want to purchase the item from a specific supplier who does not have a catalog or is non-registered.

Access the screens to add a non-catalog item from the **CATALOG HOME** screen or, if you are adding items to a requisition in *Composing* status, from the bottom of the **Line Item** frame (Figure 40).

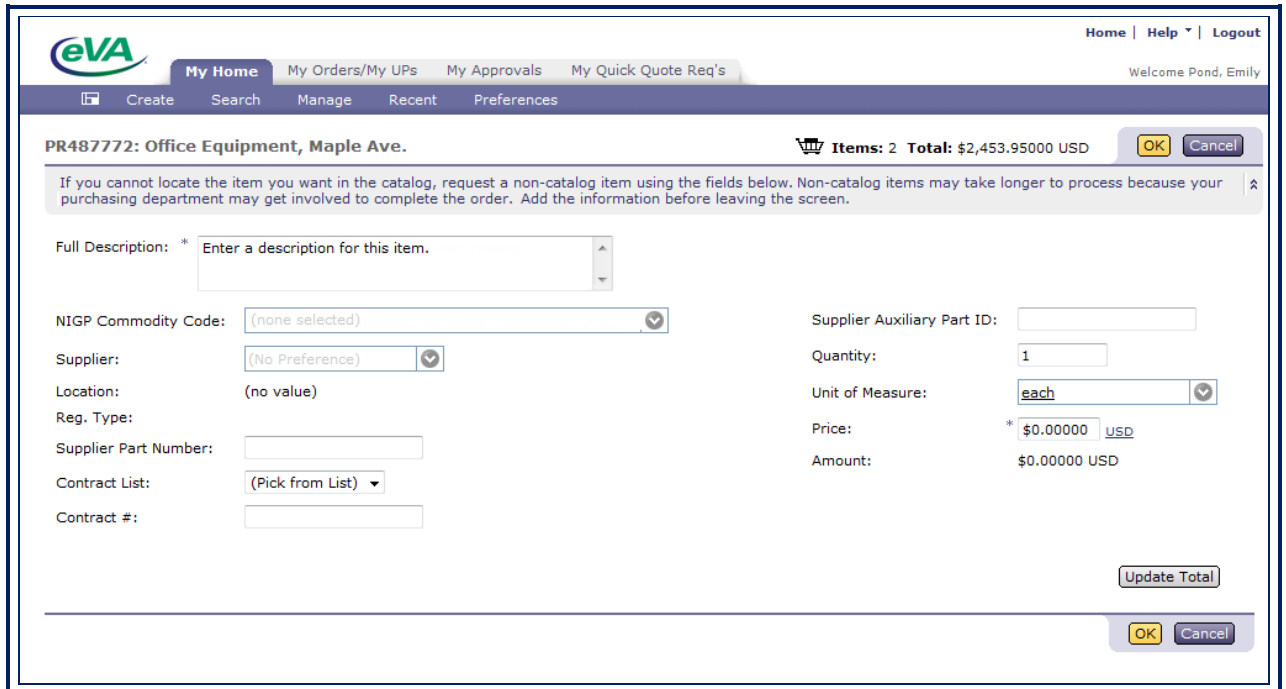
Figure 40: Adding a Non-Catalog Item



The screenshot shows the eMALL interface with the 'Line Items' section. The 'Create Non-Catalog Item' button is highlighted with a red circle. The 'Add Non-Catalog Item...' button is also highlighted with a red circle.

The **NON-CATALOG ITEM INFORMATION** screen will open (Figure 41).

Figure 41: Entering Data for a Non-Catalog Item



The screenshot shows the 'NON-CATALOG ITEM INFORMATION' screen. The screen displays various input fields for item details, including Full Description, NIGP Commodity Code, Supplier, Location, Reg. Type, Supplier Part Number, Contract List, Contract #, Supplier Auxiliary Part ID, Quantity, Unit of Measure, Price, and Amount. The 'Update Total' button is visible at the bottom right.

CREATING A PURCHASE REQUISITION

Enter details for the item you are requesting, as described in **Table 6**.

Table 6: Add Non-Catalog Item Screen Fields

Field	When and How to Use
Full Description	<ul style="list-style-type: none"> Remove the text in the Full Description box and enter a detailed description for the product you are purchasing. This is a required field.
NIGP Commodity Code	<ul style="list-style-type: none"> Select a commodity description for your product from the Commodity Code drop-down list. If the code you want is not on the list, select Search for more. <ul style="list-style-type: none"> When the COMMODITY CODE SEARCH screen opens, enter a description for your item and click Search. Click the Select button that appears beside the item you are purchasing to pull the correct code into the NIGP Commodity Code field.
Supplier	<ul style="list-style-type: none"> If the supplier you want does not appear in the Supplier drop-down list, click <i>Search for more</i>. Follow the instructions for selecting a supplier, below.
Location	<ul style="list-style-type: none"> This field will sometimes automatically populate when you select the supplier. If it does not, you can use the <i>Search for more</i> feature on the Location drop-down list.
Registration Type	<ul style="list-style-type: none"> This read-only field will automatically populate when you select the desired supplier.
Supplier Part Number	<ul style="list-style-type: none"> If you know or can find out the supplier-assigned part number for your item, enter it here.
Contract List	<ul style="list-style-type: none"> If the selected vendor has a contract, you will be asked to select the appropriate contract number. If it is not available, select <i>Item on contract but number not in list</i>.
Contract #	<ul style="list-style-type: none"> If the item is on a contract but the contract number does not appear in the drop-down list, enter the contract number here. If you selected <i>Not on contract</i> from the Contract List drop-down, the Contract # field will not be available.
Supplier Auxiliary Part ID	<ul style="list-style-type: none"> Most users do not use this field, but it is available for those who do.
Quantity	<ul style="list-style-type: none"> Enter the quantity you want to purchase. This field defaults to <i>1</i>.
Unit of Measure	<ul style="list-style-type: none"> Use the drop-down list to select the unit of measure that applies to your item. This field defaults to <i>each</i>.
Price	<ul style="list-style-type: none"> Enter the price per unit of measure. The default currency is U.S. dollars.
Amount	<ul style="list-style-type: none"> Click Update Total to populate this field. The price will be multiplied by the quantity, and the total cost will be displayed in this field.

If you are purchasing a service, remember that the **Quantity**, **Unit of Measure**, and **Price** data you enter must accurately reflect the way that service will actually be received and paid for. The example below shows two different approaches to procuring a specific service.

Example: Determine How to Enter Data When Purchasing a Service

You need to purchase a year of elevator maintenance service at the rate of \$2,400 a year.

If you will be paying for the service **at the end of the contract**, you would insert

- o **1** as the quantity
- o **Year** as the Unit of Measure
- o **\$2,400** as the price

If you will be paying for the service **in monthly installments**, you would insert

- o **12** as the quantity
- o **Month** as the Unit of Measure
- o **\$200** (\$2,400 divided by 12 months) as the price

After you enter the details for your non-catalog item, click **OK** to add the item to your requisition and return to the main **REQUISITION** screen, where the new, non-catalog item will be visible in the **Line Items** window.

Selecting a Supplier

The eMall allows three kinds of suppliers (also referred to as *vendors*):

A **Self-registered** supplier has executed a comprehensive registration process and has full access to all of the features the eMall offers to sellers. Only self-registered suppliers (or suppliers who have at least one self-registered location) can display catalog items.

A **State-entered** supplier has been added by an authorized COVA-entity user and has a more limited presence in the eMall. A state-entered supplier cannot publish catalog items; however, a buyer can search for and select a state-entered supplier and can access location and contact information.

An **Ad Hoc** supplier is an unregistered supplier that a buyer has manually added for the purpose of fulfilling one specific order. The ad hoc supplier is associated with a particular order. It will not be available to be selected for other orders .



WARNING! Your agency/organization is liable for the vendor transaction fee if you use an unregistered or state-entered supplier for your eVA purchase orders.

CREATING A PURCHASE REQUISITION

On the **NON-CATALOG ITEM** screen, use the **Supplier** drop-down list to select or search for a supplier.

Figure 42: Supplier Search Results

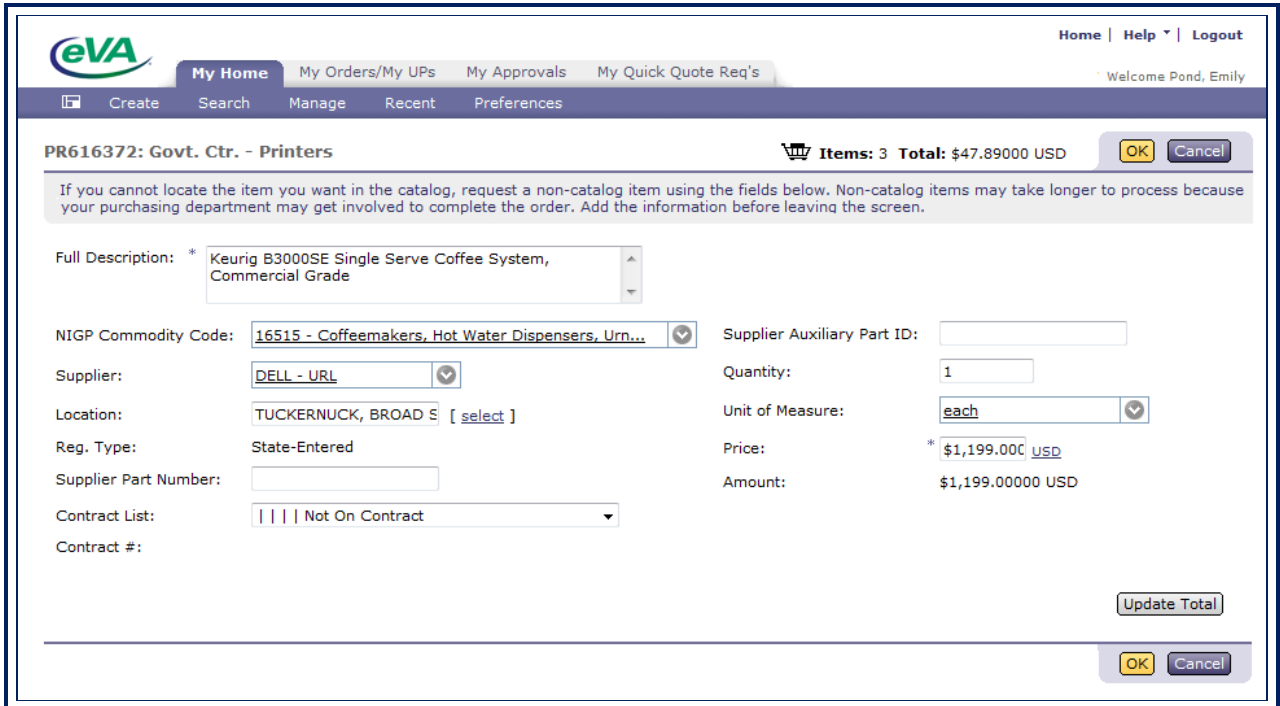
Choose Value for Supplier

Field: **Supplier Name**

Supp	VCUST#	Location Name	Street	City	State	Ordering Method	Small	Minority	Woman	Micro	Reg. Type	VCUST#
(No Preference)												
BEES DELI	000223300	RICH OFFICE	1212 Sprinkles road	Cupcake	VA	Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Registered	VS0000002206
DEEVA'S DELIGHTS	676767676	DEEVA'S DELIGHTS	123 broad street	richmond	VA	Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Registered	VS0000000648
DELL PHONICS CHICKEN	119077105	DELL - JONESTOWN	P.O. Box 123	boston	MA	Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State-Entered	E761
DELL - URL	997886775	TUCKERNUCK, BROAD ST, RICHMOND	5 Porter Street	Richmond	VA	URL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State-Entered	E1603
DELL - URL	997886775	DELL - UAT TESTING DO NOT MODIFY	9000 Midlothian Tpke	Richmond	VA	URL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Registered	E1605
EMCHECK DELETED DUNS	223344555	341 ACCT MAINT CHANGE	341 Shakedown	Fairfax	VA	Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Registered	E1012
EMCHECK DELETED DUNS	656656565	REUSE DUNS	book	richmond	CA	URL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		VS0000001367

Choose the supplier you want from the search results by clicking the corresponding **Select** button. Your selection will be entered in the **Supplier** field for the Non-Catalog item. As shown in **Figure 42**, supplier search results display one row for each of a given supplier's locations; be sure to select the location you prefer.

Figure 43: Add Non-Catalog Item Screen – Completed



After selecting a supplier, complete the **ADD NON-CATALOG ITEM** screen as described in Table 6 and click **OK**. The non-catalog item you created will appear as a line item on your requisition and can be viewed in your shopping cart.

Adding a New Supplier

If the supplier you want to use is not registered in eVA, you can add a new supplier **for the current requisition only**. However, before concluding that the supplier you want is not registered, try different spellings and any alternate names you can think of to avoid possible transaction fees for using an unregistered vendor.

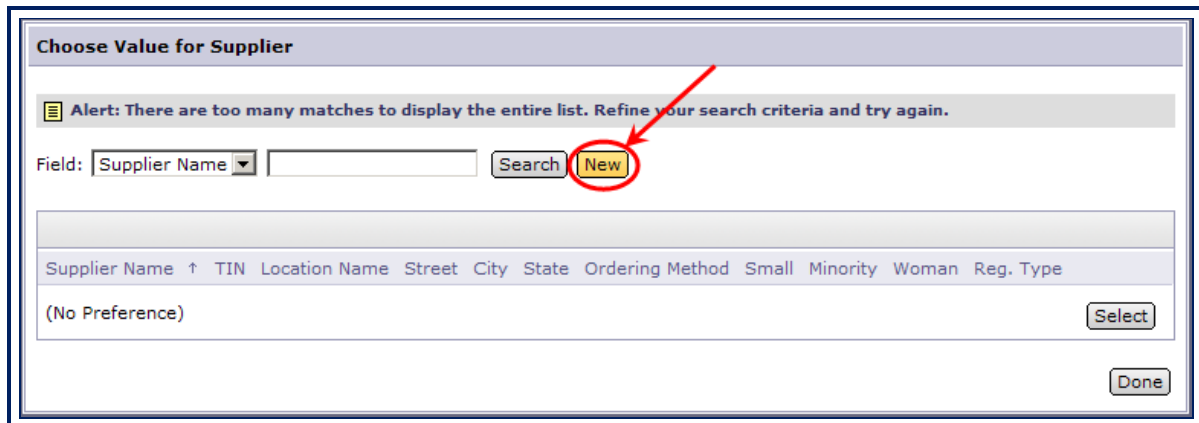


REMEMBER: Use with caution! To avoid unnecessary charges, exercise all search possibilities before entering a vendor as a 'New' vendor.


1. On the **ADD NON-CATALOG ITEM** screen, expand the **Supplier** drop-down list and select *Search for more ...* to open the **CHOOSE VALUE FOR SUPPLIER** dialog.
2. Click **New** (Figure 44) to launch the **CREATE SUGGESTED SUPPLIER** screen.

CREATING A PURCHASE REQUISITION

Figure 44: Click "New" to Add a Supplier



Choose Value for Supplier

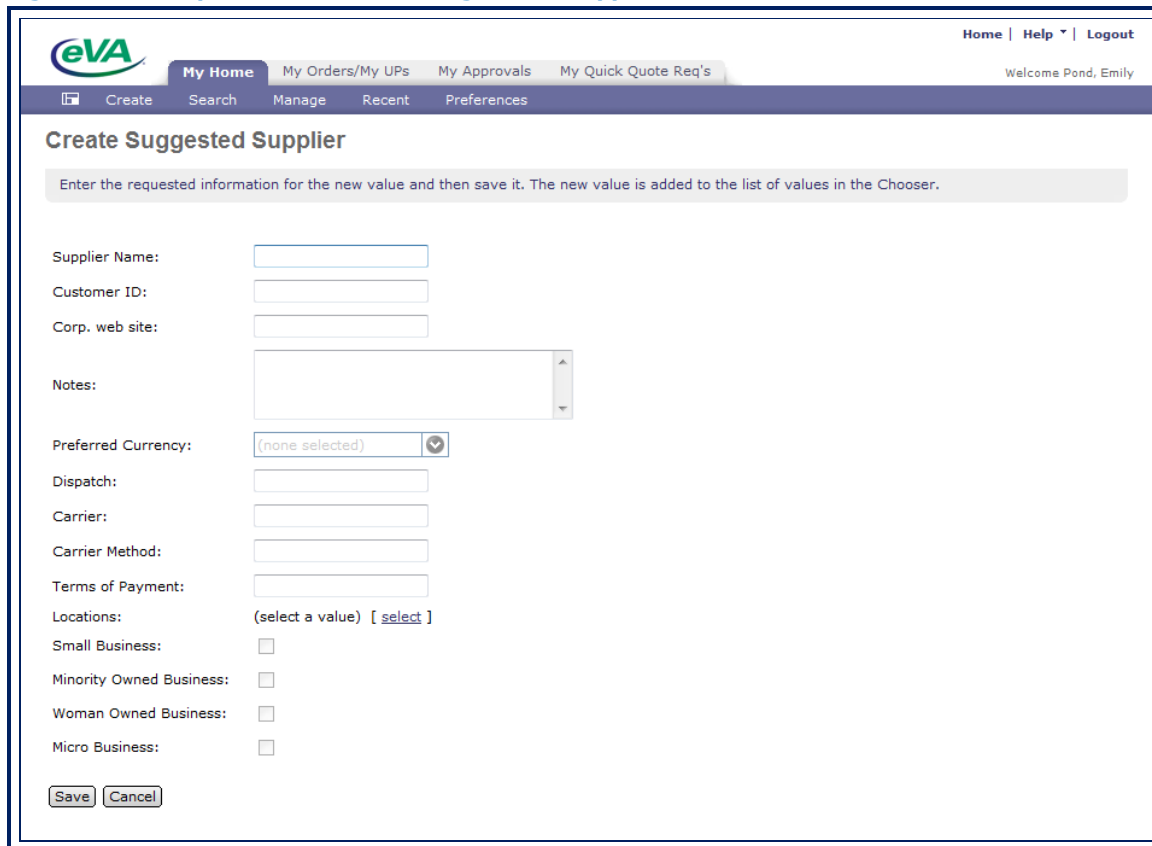
 **Alert:** There are too many matches to display the entire list. Refine your search criteria and try again.

Field:

Supplier Name	TIN	Location Name	Street	City	State	Ordering Method	Small	Minority	Woman	Reg. Type
(No Preference)										

The **CREATE SUGGESTED SUPPLIER** screen will open (Figure 45).

Figure 45: Complete to Add a Non-Registered Supplier



eVA Home | Help | Logout

My Home My Orders/My UPs My Approvals My Quick Quote Req's Welcome Pond, Emily

Create Search Manage Recent Preferences

Create Suggested Supplier


Enter the requested information for the new value and then save it. The new value is added to the list of values in the Chooser.

Supplier Name:

Customer ID:

Corp. web site:

Notes:

Preferred Currency: (none selected) 

Dispatch:

Carrier:

Carrier Method:

Terms of Payment:

Locations: (select a value) [select]

Small Business: ☐

Minority Owned Business: ☐

Woman Owned Business: ☐

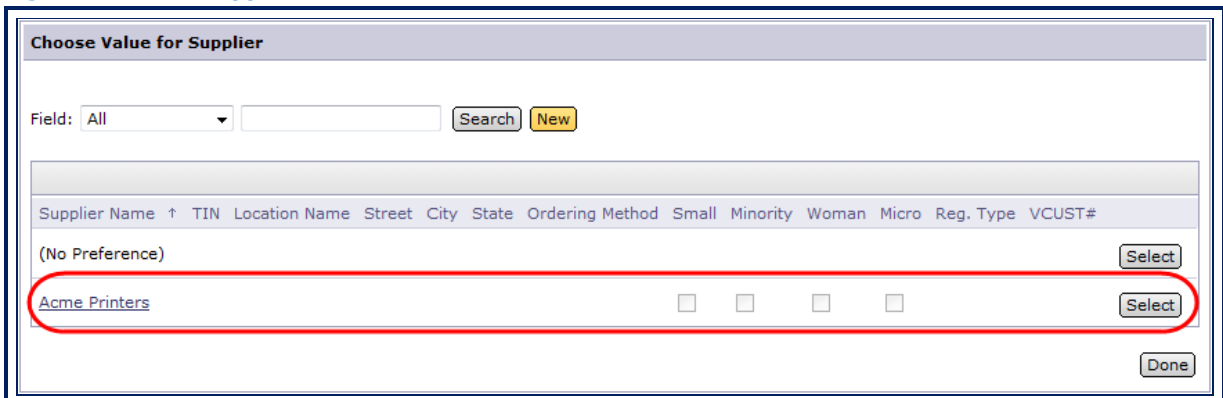
Micro Business: ☐

Enter the requested information as shown in **Table 7**. Note that only the Supplier Name is required; all other fields are optional.

Table 7: Create Suggested Supplier Screen Fields

Field	When and How to Use
Supplier Name	<ul style="list-style-type: none"> Enter the full, legal name of the supplier. (This is the only required field.)
Customer ID	<ul style="list-style-type: none"> This field is not currently in use.
Corp. web site	<ul style="list-style-type: none"> This field is not currently in use.
Notes	<ul style="list-style-type: none"> This field is not currently in use.
Preferred Currency	<ul style="list-style-type: none"> This field is not currently in use.
Dispatch	<ul style="list-style-type: none"> This field is not currently in use.
Carrier	<ul style="list-style-type: none"> This field is not currently in use.
Carrier Method	<ul style="list-style-type: none"> This field is not currently in use.
Terms of Payment	<ul style="list-style-type: none"> This field is not currently in use.
Locations	This field is not currently in use. After you save the new supplier data and associate the new supplier to the item, you can add a location from the ADD NON-CATALOG ITEM screen (Figure 43).
Small Business	<ul style="list-style-type: none"> This field cannot be completed by the user.
Minority Owned Business	<ul style="list-style-type: none"> This field cannot be completed by the user.
Woman Owned Business	<ul style="list-style-type: none"> This field cannot be completed by the user.
Micro Business	<ul style="list-style-type: none"> This field cannot be completed by the user.

After you enter the new supplier information, click **Save**. You will be returned to the **CHOOSE VALUE FOR SUPPLIER** dialog box, where the name of the supplier you entered will be available for selection (Figure 46).

Figure 46: New Supplier Available for Selection


Choose Value for Supplier

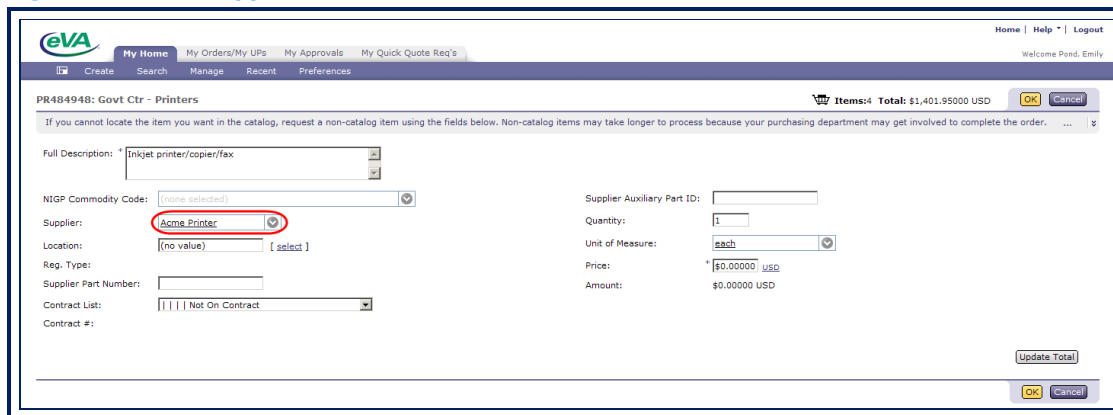
Field: All

Supplier Name	TIN	Location Name	Street	City	State	Ordering Method	Small	Minority	Woman	Micro	Reg. Type	VCUST#
(No Preference)												<input type="button" value="Select"/>
Acme Printers							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="Select"/>

CREATING A PURCHASE REQUISITION

Click the corresponding **Select** button to choose the new supplier and return to the **ADD NON-CATALOG ITEM** screen, where your new supplier will be displayed in the **Supplier Name** field (Figure 47).

Figure 47: New Supplier Selected

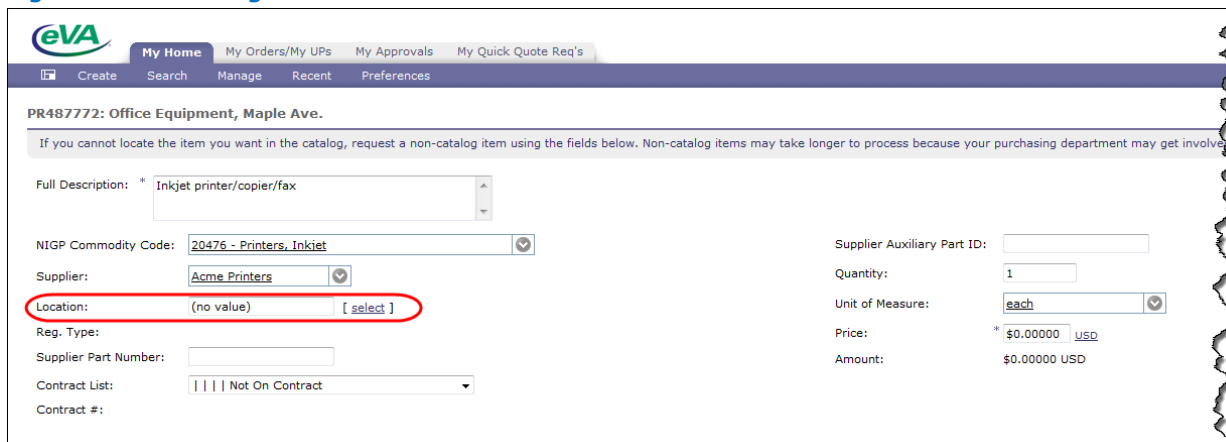


Adding an Ordering Location

You can add an ordering location to any supplier by completing the **CREATE CUSTOM LOCATION** screen. However, if you are using a *registered* supplier (self-registered or state-entered), and you want to order from a location that is not on the **Location** pick list, it is better to contact the supplier and ask them to add the location than to add it yourself. (See [About Unregistered Suppliers](#) for more information.)

If your supplier is unregistered, access the **CREATE CUSTOM LOCATION** screen from the **ADD NON-CATALOG ITEM** screen (Figure 48).

Figure 48: Accessing the Create Custom Location Screen



Click the **[select]** link next to the **Location** field to open the **CHOOSE VALUE FOR LOCATION** screen, and then click **New** to launch the **CREATE CUSTOM LOCATION** screen (Figure 49). Complete all required fields (indicated by an asterisk) and click **Save**.

Figure 49: Create Custom Location Screen

Create Custom Location

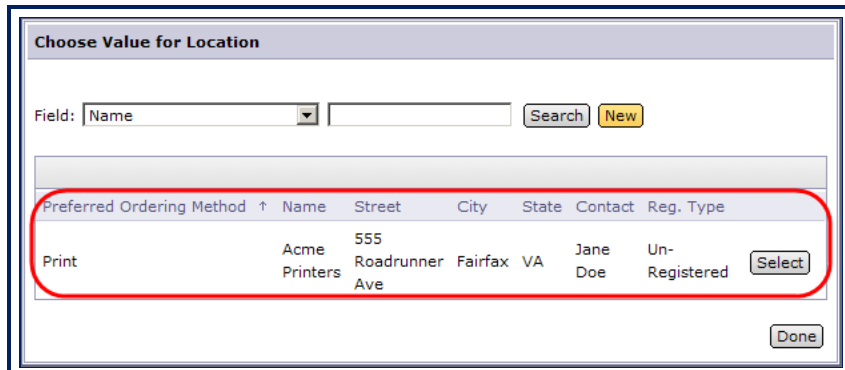
Enter the requested information for the new value and then save it. The new value is added to the list of values in the Chooser.

Name:	*	<input type="text" value="Acme Printers"/>
Street:	*	<input type="text" value="555 Roadrunner Ave"/>
City:	*	<input type="text" value="Fairfax"/>
State:	*	<input type="text" value="VA"/>
Postal Code:	*	<input type="text" value="22032"/>
Country:		<input type="text" value="(none selected)"/>
ID:		AD12790
Contact (Joe Smith):	*	<input type="text" value="Jane Doe"/>
Email Address:	*	<input type="text" value="jdoe@acme.com"/>
Phone:	*	<input type="text" value="703-555-1212"/>
Fax:		<input type="text"/>
Tax Id Number (TIN):	*	<input type="text" value="765765765"/>
Tax Id Number Type:	*	<input type="text" value="EIN"/>
DUNS Number:		<input type="text"/>
Organization Type:	*	<input type="text" value="Corporation"/>
LL Company (LLC):		(no value)
Reg. Type:		Un-Registered
Vendor Location Id Number:		
Preferred Ordering Method:		Print

CREATING A PURCHASE REQUISITION

When you save the custom location information, you will be returned to the **CHOOSE VALUE FOR LOCATION** dialog box, where you will be able to select the new order location (Figure 50).

Figure 50: Newly Created Order Location



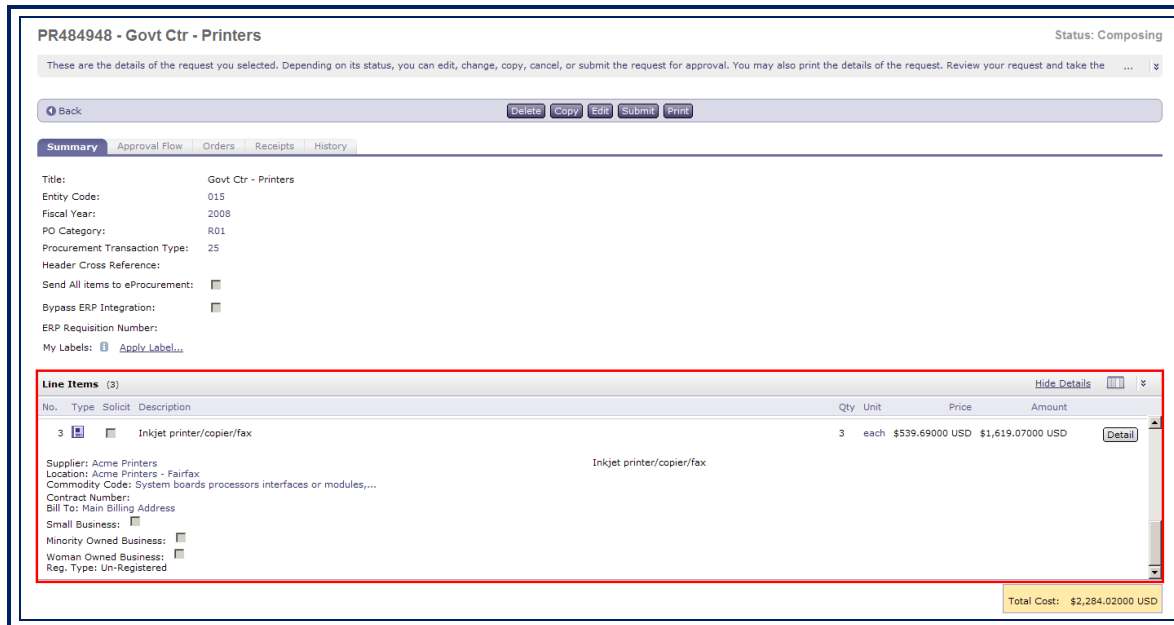
The dialog box is titled "Choose Value for Location". It features a search interface with a "Field:" dropdown set to "Name", a text input field, and "Search" and "New" buttons. Below this is a table with columns: Preferred Ordering Method, Name, Street, City, State, Contact, and Reg. Type. A red rectangle highlights the first row of the table, which contains the following data: Preferred Ordering Method: Print, Name: Acme Printers, Street: 555 Roadrunner Ave, City: Fairfax, State: VA, Contact: Jane Doe, and Reg. Type: Un-Registered. A "Select" button is located to the right of the highlighted row. At the bottom right of the dialog is a "Done" button.

Preferred Ordering Method	Name	Street	City	State	Contact	Reg. Type
Print	Acme Printers	555 Roadrunner Ave	Fairfax	VA	Jane Doe	Un-Registered

Select the new location to return to the **ADD NON-CATALOG ITEM** screen. The newly added supplier location will appear in the **Location** field. Enter any remaining information and click **OK**.

The item will appear as a line item on your requisition, with the supplier you selected and the new order location (Figure 51).

Figure 51: Requisition Displays Non-Catalog Item with New Location



The screenshot shows a requisition titled "PR484948 - Govt Ctr - Printers" with a status of "Composing". It includes a navigation bar with "Back", "Delete", "Copy", "Edit", "Submit", and "Print" buttons. Below the navigation bar are tabs for "Summary", "Approval Flow", "Orders", "Receipts", and "History". The "Summary" tab is active, displaying various fields: Title (Govt Ctr - Printers), Entity Code (015), Fiscal Year (2008), PO Category (R01), Procurement Transaction Type (25), Header Cross Reference, Send All items to eProcurement (checkbox), Bypass ERP Integration (checkbox), ERP Requisition Number, and My Labels (Apply Label...). Below these fields is a "Line Items" section with a red border. It contains a table with columns: No., Type, Solicit, Description, Qty, Unit, Price, and Amount. The first row shows: 3, Inkjet printer/copier/fax, Inkjet printer/copier/fax, 3, each, \$539.69000 USD, \$1,619.07000 USD. To the right of the table is a "Detail" button. Below the table, there is a section for "Supplier: Acme Printers" and "Location: Acme Printers - Fairfax", followed by "Commodity Code: System boards processors interfaces or modules,...", "Contract Number:", "Bill To: Main Billing Address", "Small Business:" (checkbox), "Minority Owned Business:" (checkbox), "Woman Owned Business:" (checkbox), and "Reg. Type: Un-Registered". At the bottom right, a yellow box displays "Total Cost: \$2,284.02000 USD".

No.	Type	Solicit	Description	Qty	Unit	Price	Amount
3			Inkjet printer/copier/fax	3	each	\$539.69000 USD	\$1,619.07000 USD

About Unregistered Suppliers

Although eVA allows you to enter a new supplier for a specific order, that supplier's status will be listed as *Unregistered*. If you add a custom ordering location for a *registered* supplier, **that supplier will be treated as unregistered** for any order that uses the custom location.

As previously stated, your agency/entity could be liable for a transaction fee if you use an unregistered supplier for your eVA purchase orders.

In addition, when you order from an unregistered supplier, the **Preferred Ordering Method** will be set to *Print*, indicating that the supplier cannot receive electronic orders from the eMall. When you submit a requisition that uses an unregistered supplier, you must print your order and fax or mail it to the supplier for fulfillment.



IMPORTANT! Any new supplier you add is for the **current** requisition only. The eMall **WILL NOT** retain this data. If you want to purchase from this supplier again, please refer the supplier to the **eVA HOME** page to register.

If you need more than one item from an unregistered supplier, you will want to [copy](#) the first item after you place it in your shopping cart. Select the new line item and make the necessary edits to the item description, price, and other details. Otherwise,

- You will have to re-enter all of the supplier information, *and*
- The requisition will split the transaction into separate orders.

ADDING A FAVORITE ITEM TO YOUR REQUISITION

The eMall lets you designate hosted catalog items as Favorites and group them in folders.. Adding a Favorite item to your requisition is quick and easy. To learn about managing and using Favorite items, see [Adding a Favorite Item to a Requisition](#).

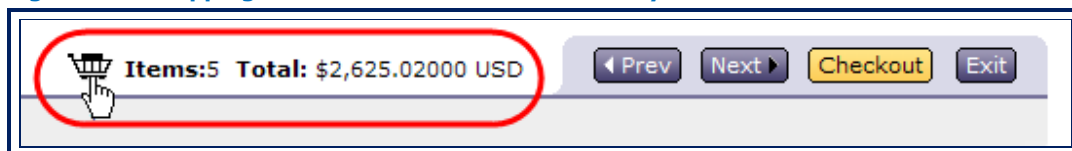
ADDING ITEMS FROM A SAVED SEARCH

Another way to add items to a requisition is from a saved search. To learn how to search for items in the eMall, see [Section 8, Searching the eMall](#); or, to focus specifically on how to save a search to use again later, see [Saving a Search](#).

YOUR SHOPPING CART

The **Shopping Cart** icon and contents summary (Figure 52) are visible on the **CATALOG HOME** screen and on any catalog search results screen. When you open a new requisition, your shopping cart will be empty (zero dollars and zero items). As you add items to your cart, the contents summary will reflect the current number of line items and the total dollar amount of the items in your shopping cart.

Figure 52: Shopping Cart Icon and Contents Summary



Each time you select an item for purchase, eVA will create a line item in your shopping cart and then return the **CATALOG HOME** screen so that you can continue to shop.

Example: Item versus Line Item

What's the Difference Between an Item and a Line Item?

As used in this manual, an item is one purchase unit (some items might be sold only by the dozen, for example) of any article you can buy in the eMall, while a line item represents the total number of purchase units of a particular article in your shopping cart or on a requisition.

For example, if you add one table and one chair to your shopping cart, they will be entered as two separate line items. If you decide that you need to increase the quantity of chairs from one to six, you will have seven items in your cart, but still only two line items.

Click the **Shopping Cart** icon to open the **SHOPPING CART** screen. In this screen you can:

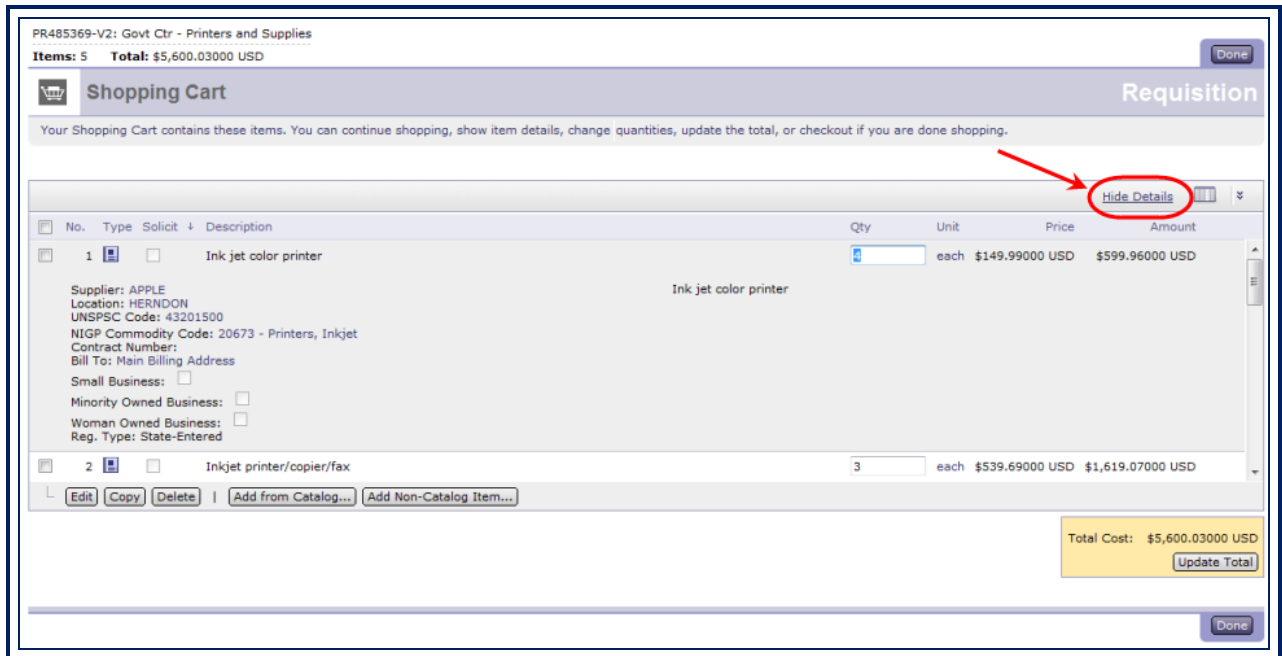
- Edit, copy, or delete items you have placed in the cart.
- Click **Add from Catalog** or **Add Non-Catalog Item** to continue shopping.
- Click **Update Total** after adjusting quantities or deleting items.
- Click **Done** to leave the Shopping Cart and return to the previous screen.



REMEMBER: *PunchOut items must be edited from the vendors' PunchOut site. Click the PunchOut item description to quickly return to the PunchOut catalog.*

The default view of the Shopping Cart provides full details for each line item (**Figure 53**).

Figure 53: Details View of Shopping Cart Line Item



PR485369-V2: Govt Ctr - Printers and Supplies
Items: 5 Total: \$5,600.03000 USD

Shopping Cart Requisition

Your Shopping Cart contains these items. You can continue shopping, show item details, change quantities, update the total, or checkout if you are done shopping.

[Hide Details](#)

No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Ink jet color printer	1	each	\$149.99000 USD	\$599.96000 USD
Supplier: APPLE Location: HERNDON UNSPSC Code: 43201500 NIGP Commodity Code: 20673 - Printers, Inkjet Contract Number: Bill To: Main Billing Address Small Business: <input type="checkbox"/> Minority Owned Business: <input type="checkbox"/> Woman Owned Business: <input type="checkbox"/> Reg. Type: State-Entered							
2			Inkjet printer/copier/fax	3	each	\$539.69000 USD	\$1,619.07000 USD

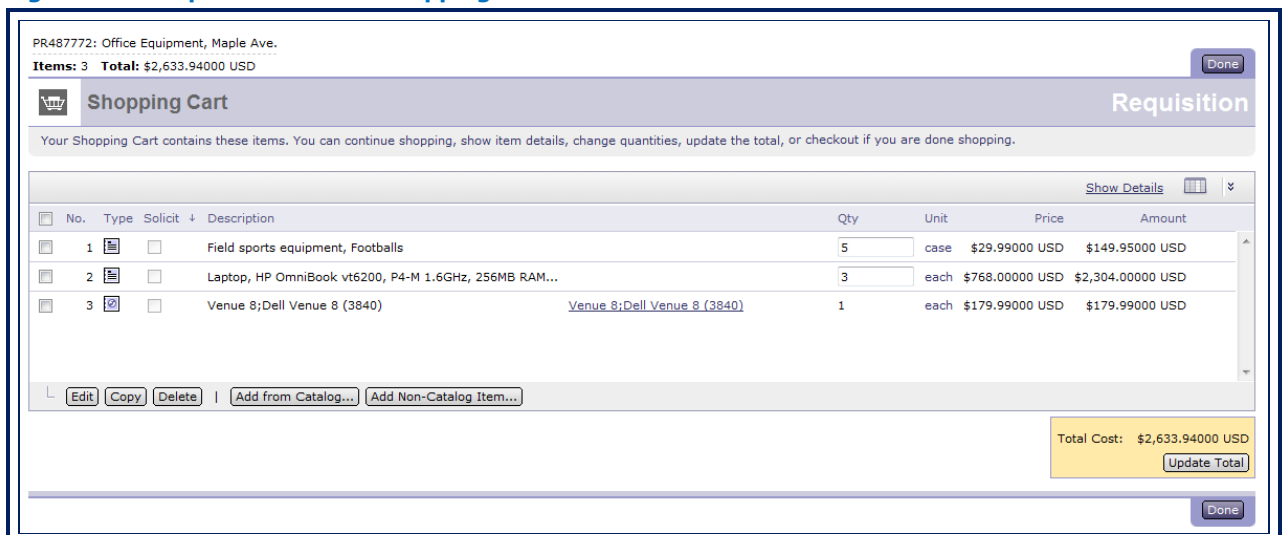
[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$5,600.03000 USD
[Update Total](#)

[Done](#)

Or, if you prefer, you can click **Hide Details** to change the Shopping Cart view to a simple list format as shown in **Figure 54**. You will be able to perform all of the same functions that are available in the detail view.

Figure 54: Simple List View of Shopping Cart



PR487772: Office Equipment, Maple Ave.
Items: 3 Total: \$2,633.94000 USD

Shopping Cart Requisition

Your Shopping Cart contains these items. You can continue shopping, show item details, change quantities, update the total, or checkout if you are done shopping.

[Show Details](#)

No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Field sports equipment, Footballs	5	case	\$29.99000 USD	\$149.95000 USD
2			Laptop, HP OmniBook vt6200, P4-M 1.6GHz, 256MB RAM...	3	each	\$768.00000 USD	\$2,304.00000 USD
3			Venue 8; Dell Venue 8 (3840)	1	each	\$179.99000 USD	\$179.99000 USD

[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

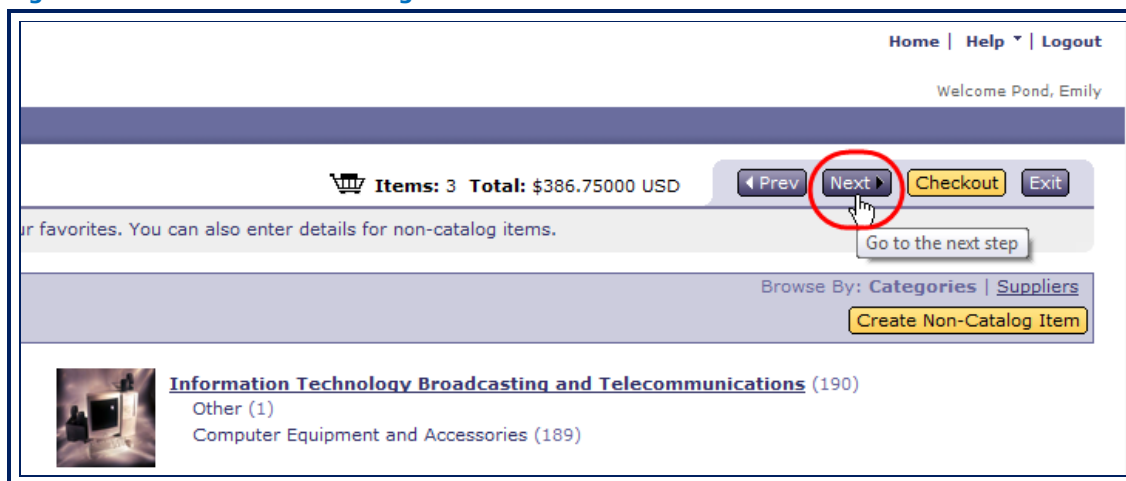
Total Cost: \$2,633.94000 USD
[Update Total](#)

[Done](#)

ADDING ACCOUNTING DETAILS

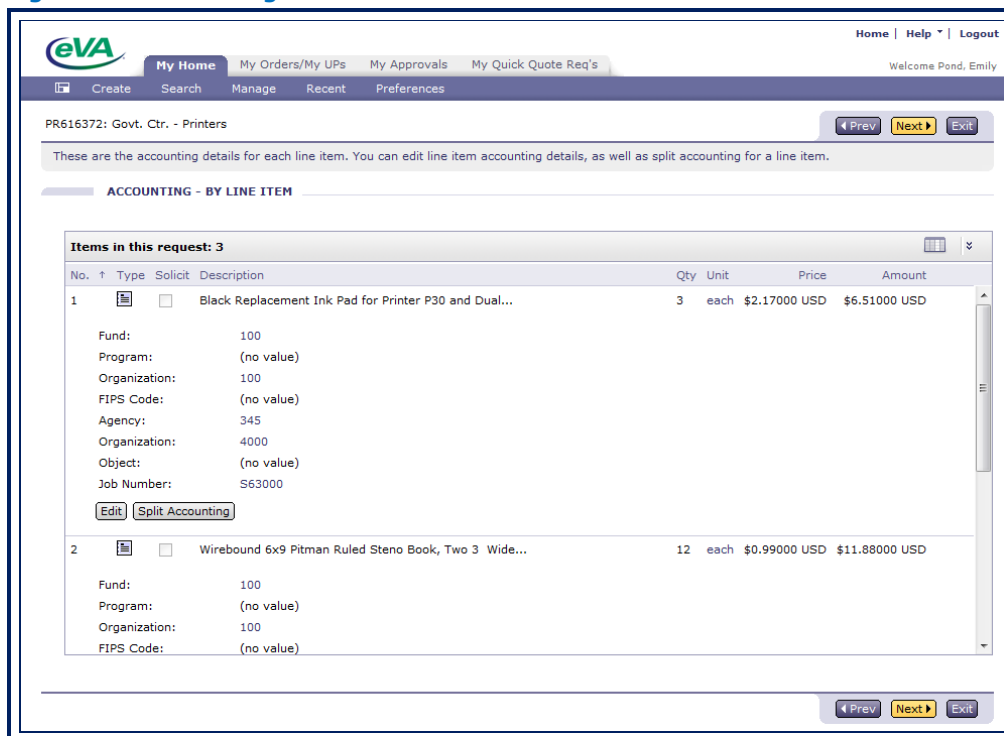
After you have selected all the items and services you need, you can enter pertinent accounting information. On the **CATALOG HOME** screen, click **Next** (Figure 55).

Figure 55: Proceed to Accounting Details



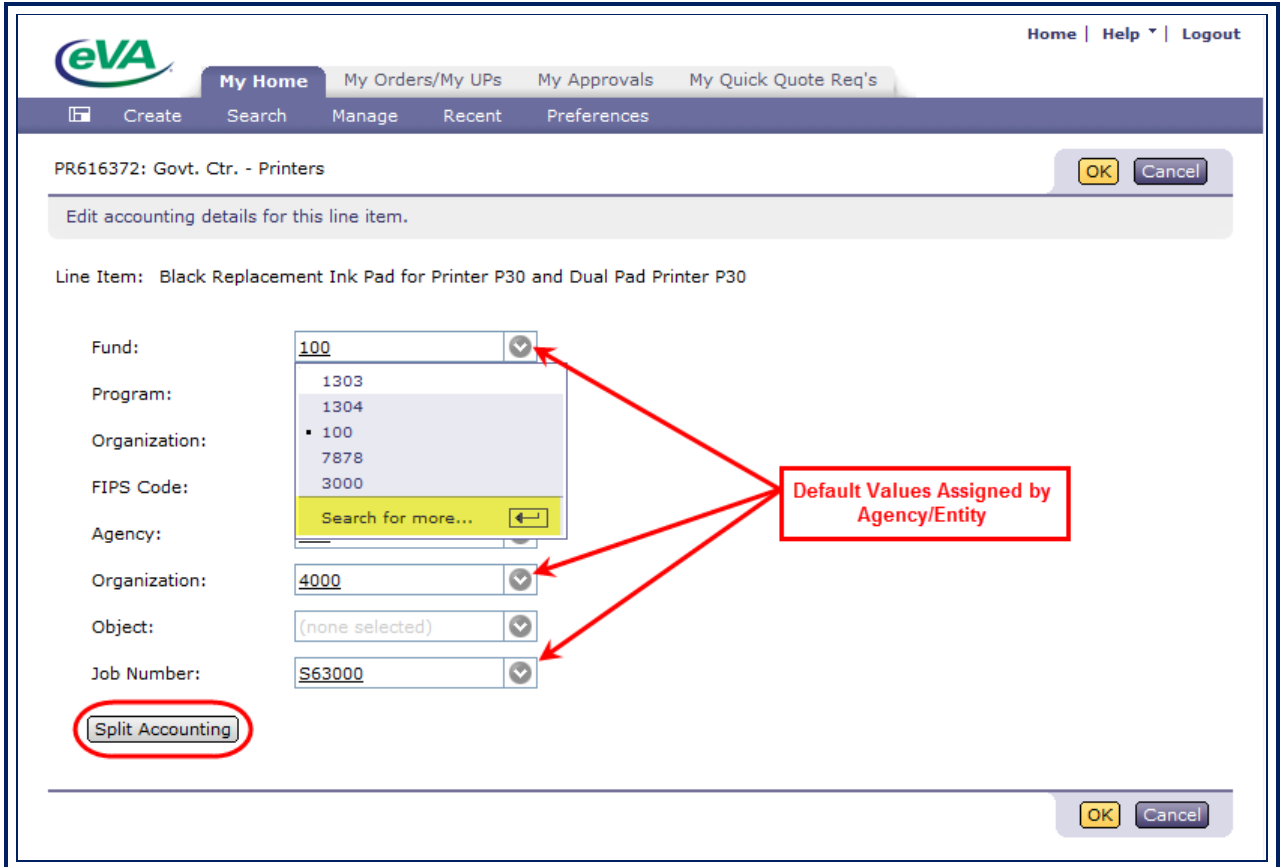
Accounting details are displayed for each line item. Click the associated **Edit** button to make changes to a particular line item.

Figure 56: Accounting Details for Line Items



If your agency/entity has set up default values for your BSO, those values will be displayed (Figure 57). Edit the information as needed and click **OK** to return to the **ACCOUNTING – BY LINE ITEM** section.

Figure 57: Accounting Details at the Line Item Level



There are two ways to edit a value:

- If you know the valid value you want, type it directly into the field, or
- If you prefer to select from a list of valid values, click the down arrow in the field you want to edit. Recently used values will appear in the drop-down list; if the value you want is not in the list, select *Search for more ...*

If multiple departments will share the cost of a particular line item, you can choose to split the accounting for any item. See [Split Accounting](#) for more information.

When you have made any necessary changes to the accounting information and returned to **ACCOUNTING – BY LINE ITEMS**, click **Next** to see a summary of the requisition.

CHECKOUT

If you have added all the items you need to your shopping cart, and you do not want to make any changes to the accounting information, click **Checkout** on the **CATALOG HOME** screen (Figure 58) or other search screen to go directly to the **Summary** tab. (You will still be able to access and change accounting information should you change your mind.)

Figure 58: Click Checkout to Bypass Accounting Screens



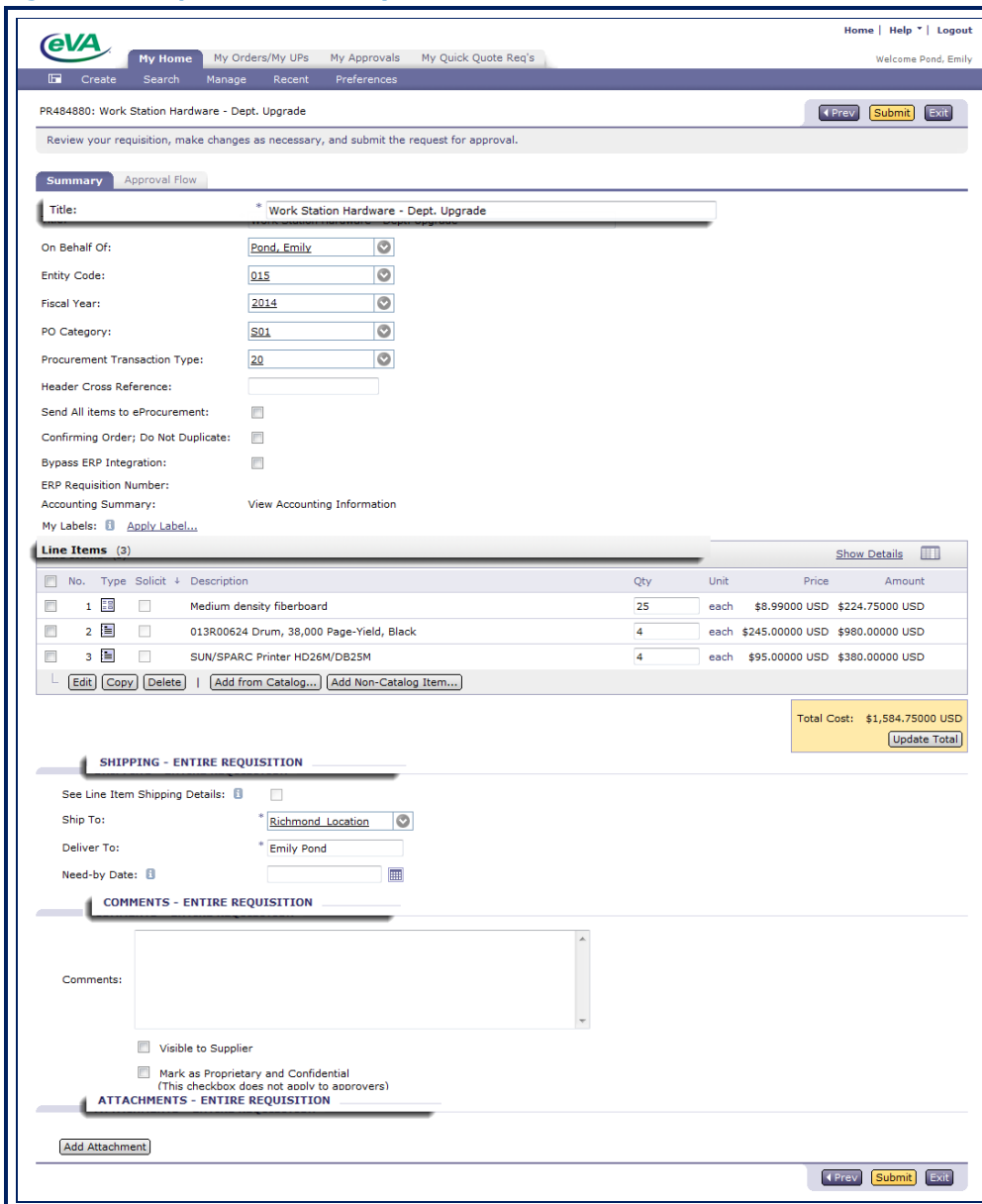
Note: If you are returning to a saved requisition, click the **Requisition Number** in the **My Home** tab to go to the **Summary** tab and begin checkout.

SUMMARY TAB

The **Summary** tab allows you to review the entire requisition on a single screen, make changes, and add comments and attachments before you submit the requisition for approval. As shown in **Figure 59**, the **Summary** tab has five sections:

- Title and Basic Information
- Line Items
- Shipping – Entire Requisition
- Comments – Entire Requisition
- Attachments – Entire Requisition

Figure 59: Requisition Summary Tab



The screenshot displays the eVA Requisition Summary Tab interface. At the top, there is a navigation bar with links for Home, Help, and Logout. Below this, a breadcrumb trail shows the user's path: My Home > My Orders/My UPs > My Approvals > My Quick Quote Req's. The main header area includes a search bar and a list of tabs: Create, Search, Manage, Recent, and Preferences. The requisition title is "PR484880: Work Station Hardware - Dept. Upgrade". The user is logged in as "Pond, Emily".

The **Summary** tab is selected, showing the following sections:

- Title and Basic Information:** This section contains fields for Title, On Behalf Of, Entity Code, Fiscal Year, PO Category, Procurement Transaction Type, Header Cross Reference, Send All items to eProcurement, Confirming Order; Do Not Duplicate, Bypass ERP Integration, ERP Requisition Number, Accounting Summary, and My Labels. The Title field is populated with "Work Station Hardware - Dept. Upgrade".
- Line Items:** This section displays a table of requisition line items. The table has columns for No., Type, Solicit, Description, Qty, Unit, Price, and Amount. There are three line items listed:

No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Medium density fiberboard	25	each	\$8.99000 USD	\$224.75000 USD
2			013R00624 Drum, 38,000 Page-Yield, Black	4	each	\$245.00000 USD	\$980.00000 USD
3			SUN/SPARC Printer HD26M/DB25M	4	each	\$95.00000 USD	\$380.00000 USD
- Shipping - Entire Requisition:** This section contains fields for See Line Item Shipping Details, Ship To, Deliver To, and Need-by Date. The Ship To field is populated with "Richmond Location".
- Comments - Entire Requisition:** This section contains a text area for comments and checkboxes for "Visible to Supplier" and "Mark as Proprietary and Confidential".
- Attachments - Entire Requisition:** This section contains a button for "Add Attachment".

At the bottom right, the Total Cost is displayed as \$1,584,750.00 USD. The interface includes navigation buttons for Prev, Submit, and Exit.

CREATING A PURCHASE REQUISITION

TITLE AND BASIC INFORMATION SECTION

The information in this section is taken from the **ADD TITLE** screen. It contains general information pertaining to the entire requisition. Review this section to ensure all the information is correct.

LINE ITEMS

This section displays a list of the line items you have selected for purchase. The default view provides detailed information for each line item.

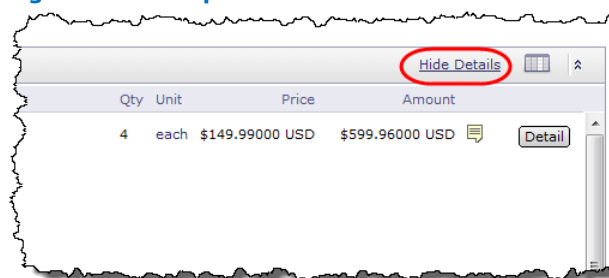
Figure 60: Details View of Line Item Section



No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer	1	each	\$64.99000 USD	\$64.99000 USD
Supplier: DELL Location: DELL Commodity Code: Computers, Other Computers (20300 20310 20314... Contract Number: Bill To: Main Billing Address Small Business: <input type="checkbox"/> Minority Owned Business: <input checked="" type="checkbox"/> Woman Owned Business: <input type="checkbox"/> Reg. Type: Self-Registered							
2			Ink jet color printer	4	each	\$149.99000 USD	\$599.96000 USD
Supplier: APPLE Location: HERNDON Commodity Code: System boards processors interfaces or modules,... Contract Number: Bill To: Main Billing Address Small Business: <input type="checkbox"/> Minority Owned Business: <input type="checkbox"/> Woman Owned Business: <input type="checkbox"/> Reg. Type: State-Entered							







To see only basic information for all line items, select the **Hide Details** link above the **Amount** column.

Figure 61: Collapse Line Items to Hide Details



No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer;Dell B1160 Mono Laser Printer	1	each	\$64.99000 USD	\$64.99000 USD
2			Ink jet color printer	4	each	\$149.99000 USD	\$599.96000 USD

Figure 62: Collapsed View of Line Items

Line Items (9)								Show Details	
<input type="checkbox"/>	No.	Type	Solicit	Description ↑	Qty	Unit	Price	Amount	
<input type="checkbox"/>	3		<input type="checkbox"/>	013R00628 Drum Unit, Black	5	each	\$181.00000 USD	\$905.00000 USD	
<input type="checkbox"/>	4		<input type="checkbox"/>	016187900 Toner, 5000 Page-Yield, Cyan	10	each	\$160.00000 USD	\$1,600.00000 USD	
<input type="checkbox"/>	5		<input type="checkbox"/>	016188100 Toner, 4000 Page-Yield, Yellow	10	each	\$160.00000 USD	\$1,600.00000 USD	
<input type="checkbox"/>	6		<input type="checkbox"/>	Dell B1160 Mono Laser Printer;Dell B1160 Mono Lase...	3	each	\$74.99000 USD	\$224.97000 USD	
<input type="checkbox"/>	2		<input type="checkbox"/>	Inkjet printer/copier/fax	3	each	\$539.69000 USD	\$1,619.07000 USD	
<input type="checkbox"/>	8		<input type="checkbox"/>	Microfiche Reader/Printer Toner	1	each	\$539.69000 USD	\$539.69000 USD	
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/> <input type="button" value="Add from Catalog..."/> <input type="button" value="Add Non-Catalog Item..."/>									

Although there is limited functionality in this screen, you can make certain changes. Refer to [Table 8](#) to see the changes that can be applied from the Requisition **Summary** tab.

Table 8: Updating Line Items from the Summary Tab

Action	Hosted Catalog Item	PunchOut Catalog Item	Non-catalog Item
Change Quantities	X		X
Copy Line Item	X		X
Copy Multiple Line Items	X		X
Delete Line Item	X	X*	X
Delete Multiple Line Items	X	X*	X

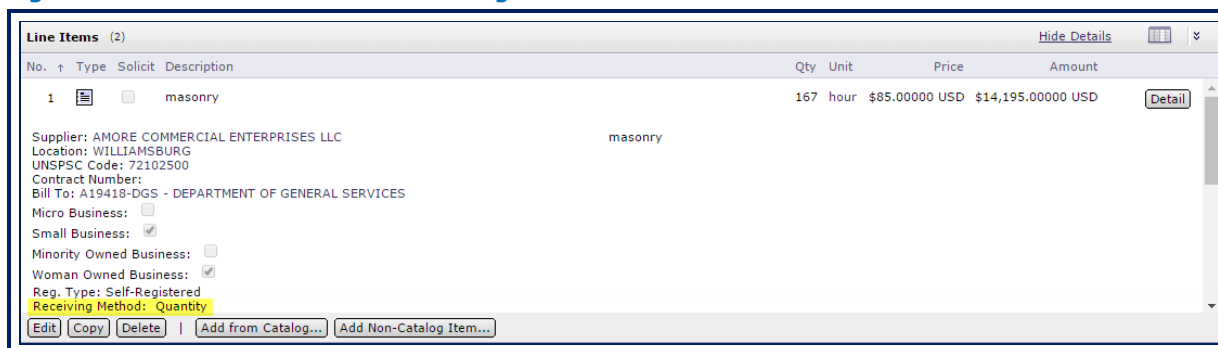
* Remember, you must delete all of the line items associated with the PunchOut catalog. To delete only some PunchOut catalog line items, you must return to the catalog.

To access all information pertaining to a given line item, select the checkbox next to the item and then click **Edit**. The **LINE ITEM DETAILS** screen will open. In this screen, you can access and adjust various attributes for the selected item, such as shipping and billing addresses; you can also adjust accounting data, including dividing your order between two or more account numbers (see [Chapter 7: Split Accounting](#)). For more information, see [Chapter 8: Editing Line Items](#).

CREATING A PURCHASE REQUISITION

Receiving Method

If your agency has enabled Receive by Amount functionality, you will see the **Receiving Method** field on each line item in this view. The default value of *Amount* will be displayed, as shown in **Figure 63**.

Figure 63: Line Item View with Receiving Method


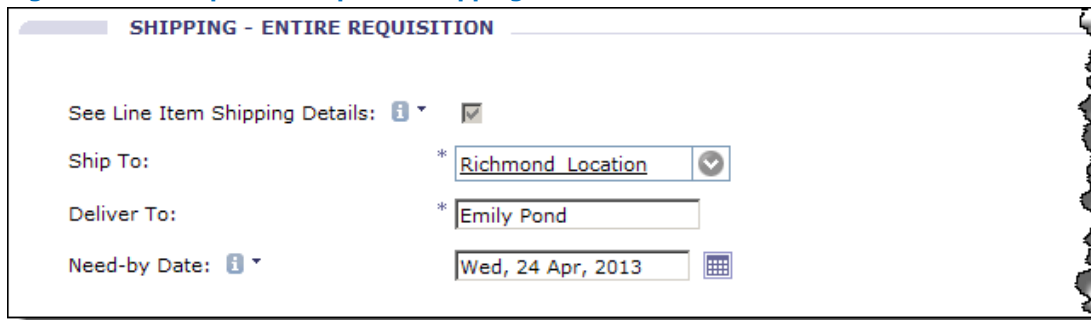
For instructions on how to receive by amount instead of quantity, see [Receiving by Amount](#) Receiving by Amount in Chapter 8.

SHIPPING – ENTIRE REQUISITION


The **SHIPPING – ENTIRE REQUISITION** section of the **Summary** tab (**Figure 64**) allows you to accept the pre-populated default information or enter new shipping information for the entire requisition.


Table 9: Completing the Shipping Information section

Field	Pre-Populated?	When and How to Use
See Line Item Shipping Details	Yes	This checkbox is for eVA use only. It is automatically selected if you have entered one or more different Ship To locations at the line item level.
Ship To:	Yes	This field is pre-populated with the default Ship To location. You can change that location using the drop-down menu.
Deliver To:	Yes	This field typically defaults to the name of the individual preparing the requisition, but any name can be entered manually.
Need-by Date	No	The date by which the requested goods or services must be received by the requestor. Click the calendar icon to select any future date.



Figure 64: Example of Completed Shipping Section


SHIPPING - ENTIRE REQUISITION

See Line Item Shipping Details:  ☒

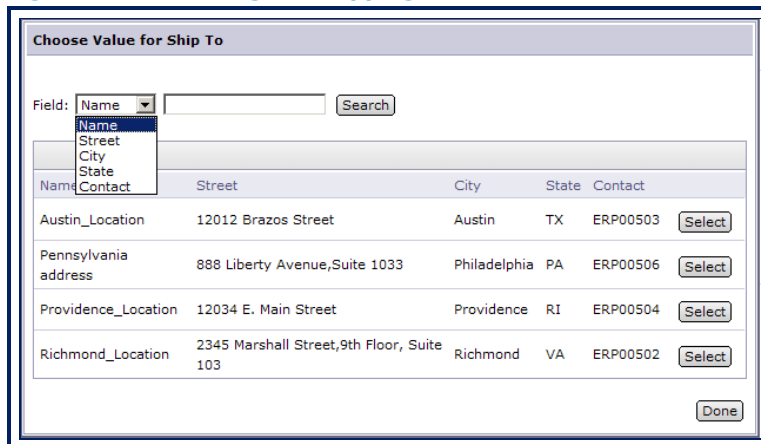
Ship To: * 

Deliver To: *


Need-by Date:  


To change the default **Ship To:** location for the current requisition, click the down arrow to open the drop-down menu. If the desired location is not on the list, select *Search for more...* to see all available locations for your organization.

You can also search for the shipping address by location name, street, city, state, or contact (**Figure 65**), which is convenient if your agency/entity has many shipping locations.

Figure 65: Searching for Shipping Locations


Choose Value for Ship To

Field: 



Name	Street	City	State	Contact	
Austin_Location	12012 Brazos Street	Austin	TX	ERP00503	<input type="button" value="Select"/>
Pennsylvania address	888 Liberty Avenue, Suite 1033	Philadelphia	PA	ERP00506	<input type="button" value="Select"/>
Providence_Location	12034 E. Main Street	Providence	RI	ERP00504	<input type="button" value="Select"/>
Richmond_Location	2345 Marshall Street, 9th Floor, Suite 103	Richmond	VA	ERP00502	<input type="button" value="Select"/>

To have an item shipped to a different location from other items, select it in the **LINE ITEMS** section and click **Edit** to make the appropriate changes in the **EDIT LINE ITEM** screen. To ship multiple items to a second location, see [Mass Editing](#).



IMPORTANT! If you need to permanently change the default location for all future requisitions, please contact your organization's eVA Lead.

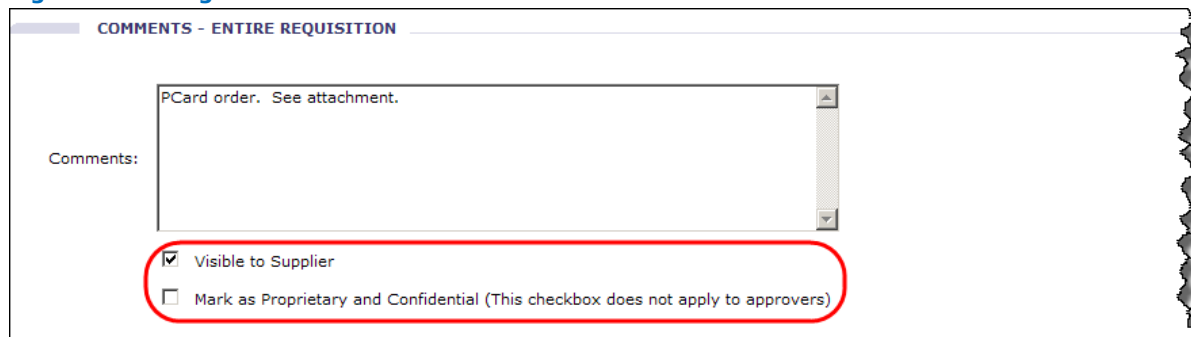
COMMENTS – ENTIRE REQUISITION

You can enter comments to justify your request or to provide additional details. Comments become a permanent part of the requisition. You can control who sees your comments by selecting one or both of the following check boxes (**Figure 66**):

- **Mark as Proprietary and Confidential:** By default, your comments can be viewed by anyone internal to your agency/entity who has access to the requisition. Select this check box to limit internal access. As noted on the screen, the *Confidential* designation does not apply to approvers. Approvers can always view your comments; they can also add their own comments to the request.
- **Visible to Suppliers:** By default, comments appear on the requisition but not on the purchase order that is sent to the supplier. Select this check box if you want the supplier to see your comments on the purchase order.

If you are creating a Change Order or a Purchase Card Order, it is advisable to enter a comment to alert the supplier.

Figure 66: Using Checkboxes to Control Access to Comments



To add comments at the line item level, select the appropriate item in the **LINE ITEMS** section and click **Edit** to open the **EDIT LINE ITEM** screen. Scroll down to the bottom of that screen to add your comments.



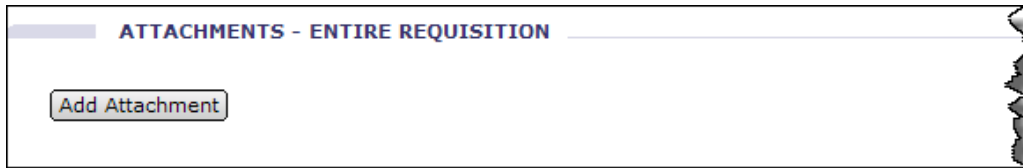
WARNING! NEVER enter your Purchase Card number in a Comments field! To be secure, your Purchase Card number should only appear in the PCard pick list in the General Information section of the requisition (**Figure 28**).

If you need multiple header comments for the ENTIRE requisition (not at the line item level), you can go back and enter additional comments after the requisition has been exited either by submission or by saving. The requisition can be in any status, and comments can be added at any time.

ATTACHMENTS – ENTIRE REQUISITION

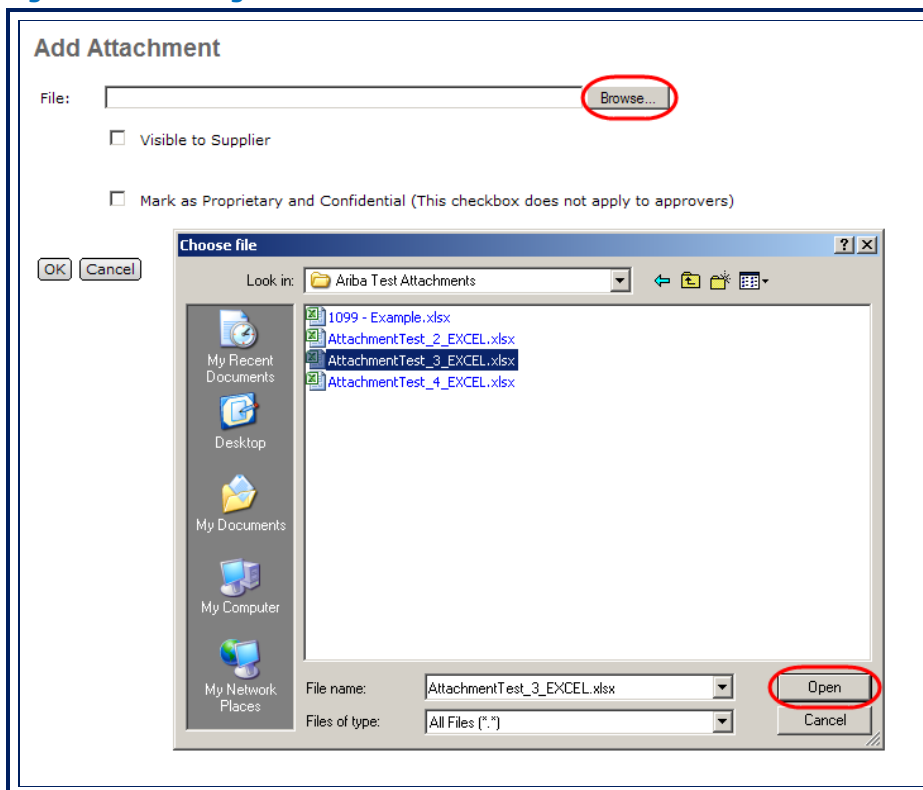
Click **Add Attachment** (Figure 67) to open the screen from which you can choose a file on your local or network drive to include with the requisition.

Figure 67: Adding an Attachment to the Requisition



On the **ADD ATTACHMENT** screen, click **Browse...** to open the **Choose file** dialog box (Figure 68).

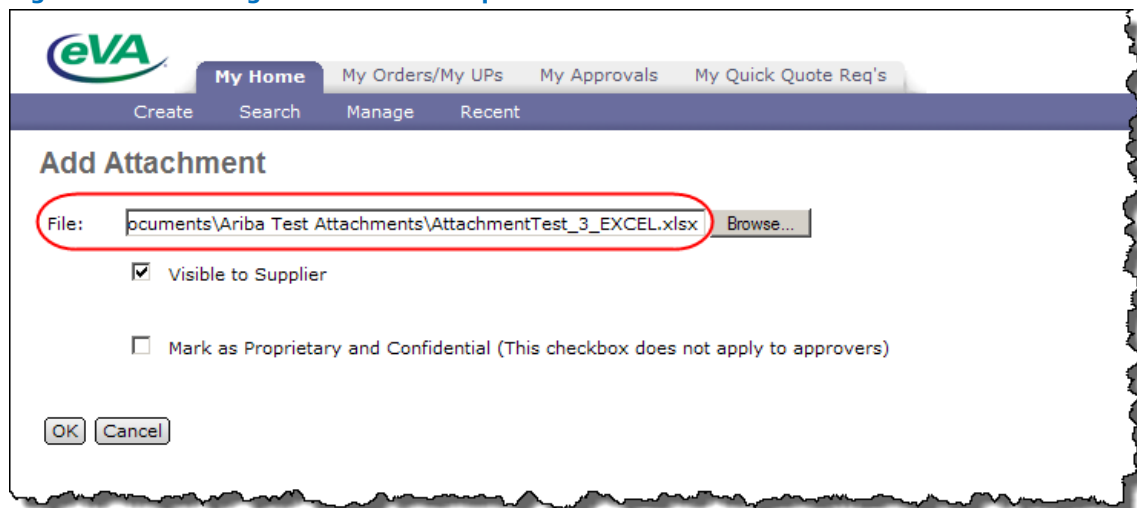
Figure 68: Creating an Attachment



Select the file you want to attach and click **Open** (or double-click the file name). The file name will appear in the **File** field of the **ADD ATTACHMENT** screen (Figure 69).

CREATING A PURCHASE REQUISITION

Figure 69: Attaching the File to the Requisition



The **ADD ATTACHMENT** screen provides the same options you saw in the [Comments](#) section, this time regarding access to view the attachment (Figure 69). Select your options (if any), and click **OK** to attach the file and return to the **Summary** tab. You will be able to adjust these selections from the **Summary** tab if you want to make changes before submitting your requisition.



NOTE: You can add multiple attachments at the requisition level, as well as line item attachments, but combined total attachment size must **NOT** exceed **10 MB**.

SUBMITTING YOUR REQUISITION

If you have finished shopping, you are ready to review and submit your requisition.

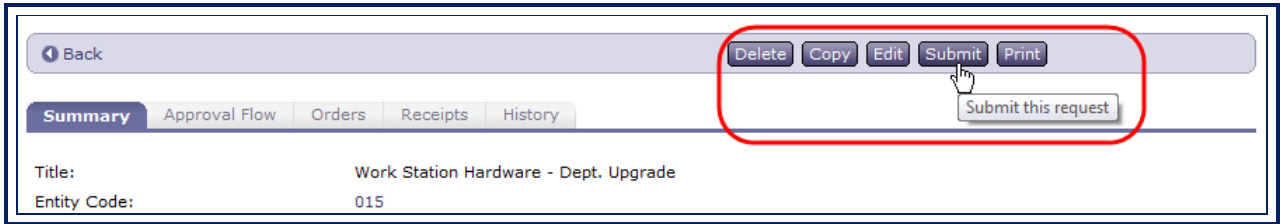
REVIEW YOUR REQUISITION

It is always a good idea to review any requisition before you submit it. For a simple requisition with no line-item level customizations, this can be accomplished from the **Summary** tab.

When reviewing a requisition, make sure that you are in the **Details** view of the **LINE ITEMS** section (Figure 53) where you can see the supplier's name and location along with the item details. If you need to implement line item changes, see [Editing Line Items](#).

SUBMIT FOR APPROVAL

When you finish your review, submit the requisition.

Figure 70: Submitting the Requisition


Even when you have performed a careful review, you might occasionally find that you need to make changes to a requisition that you have already submitted. For information about changing a requisition that has been submitted, see [Chapter 13: Modifying Requisitions](#).

Monitoring the Approval Process

The **Approval Flow** tab shows the approvals that are required in order for the requisition to move to *Ordering* status, as well as any watchers. You will be able to see the status of each approval, as shown in **Figure 71**. If your name appears as the last approver in the workflow, you will need to print the order and mail or fax it to the supplier. When all other approvals are complete, you will receive an email notification and the requisition will appear in your **To Do** list for your approval.

Figure 71: Understanding Status of Approval Flow

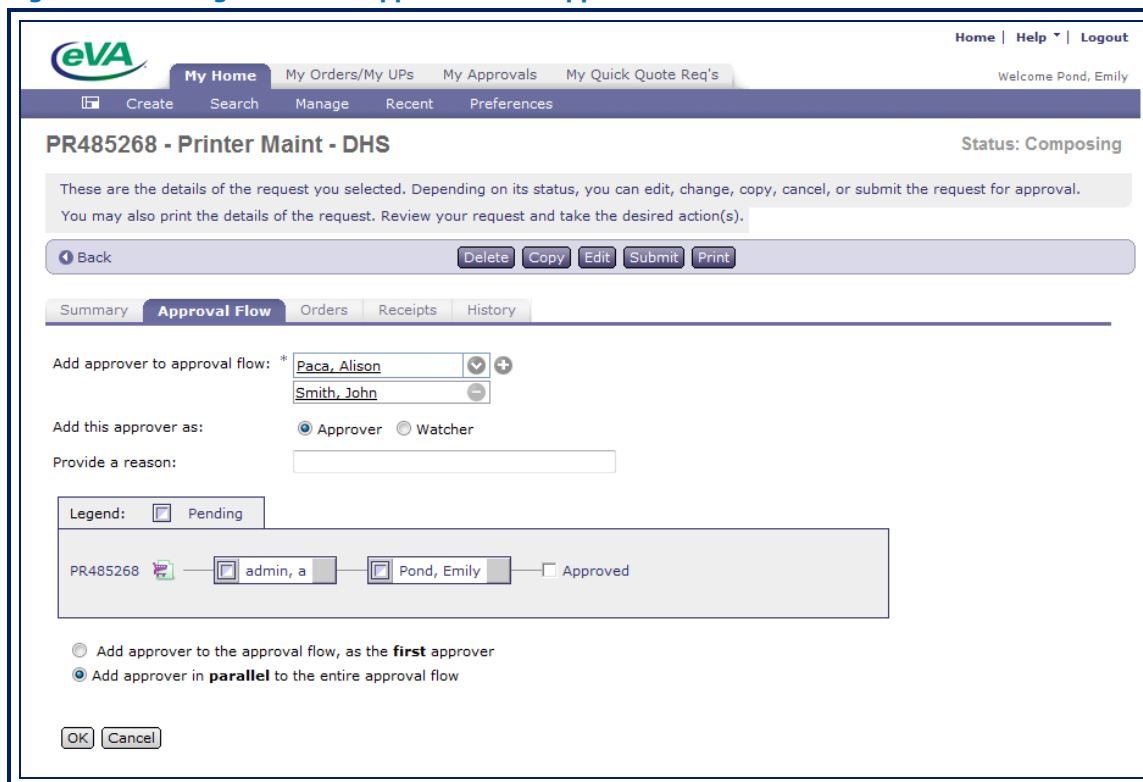

Adding and Deleting Approvers

In addition to displaying the approval flow, the **Approval Flow** tab houses the **Add Approver** and **Delete Approver** buttons (**Figure 71**).

CREATING A PURCHASE REQUISITION

Buyer-added approvers are referred to as *ad hoc* approvers. Think of them as “single-use” approvers; ad hoc approvers can take action only on the specific requisition for which they were created. If you want to add an approver, do so *before* you submit the requisition. Begin by clicking **Add Approver** (Figure 72).

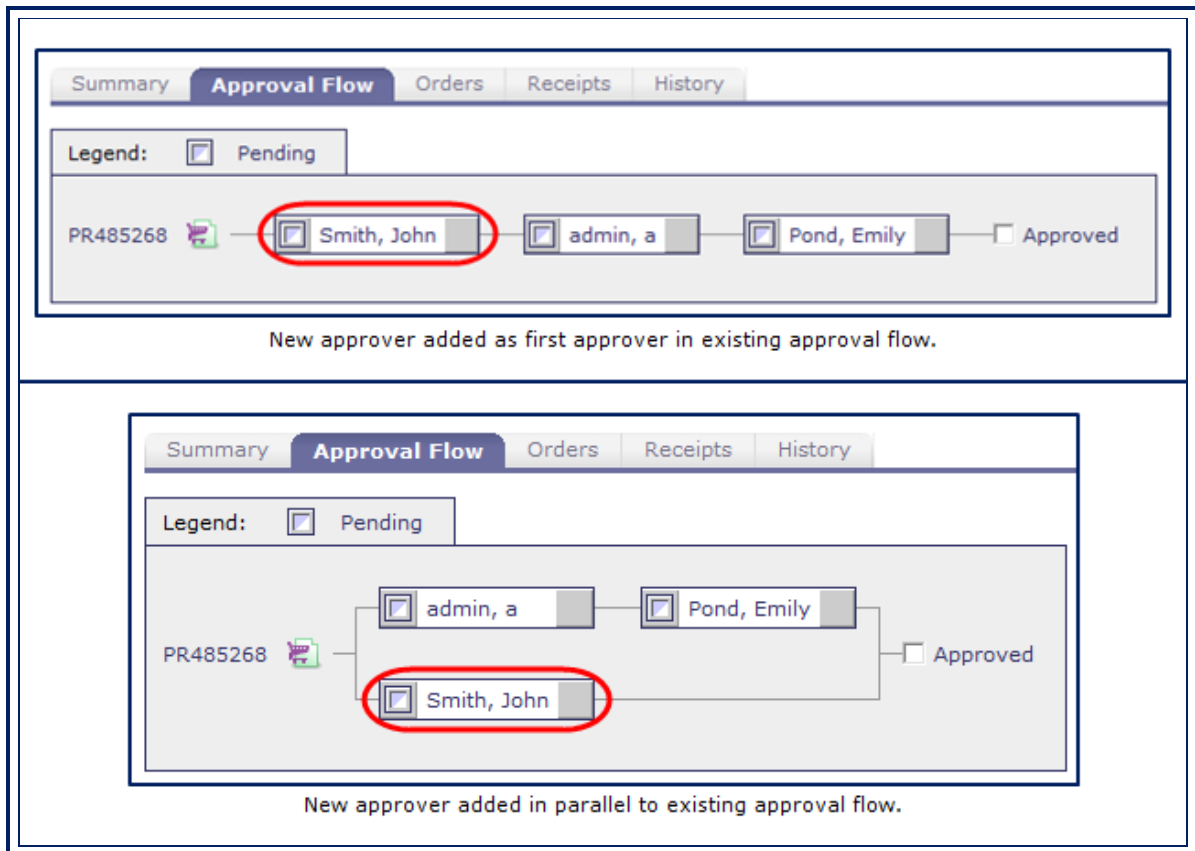
Figure 72: Adding an Ad Hoc Approver to an Approval Flow



On the **ADD APPROVER** screen (Figure 72), complete the following steps:

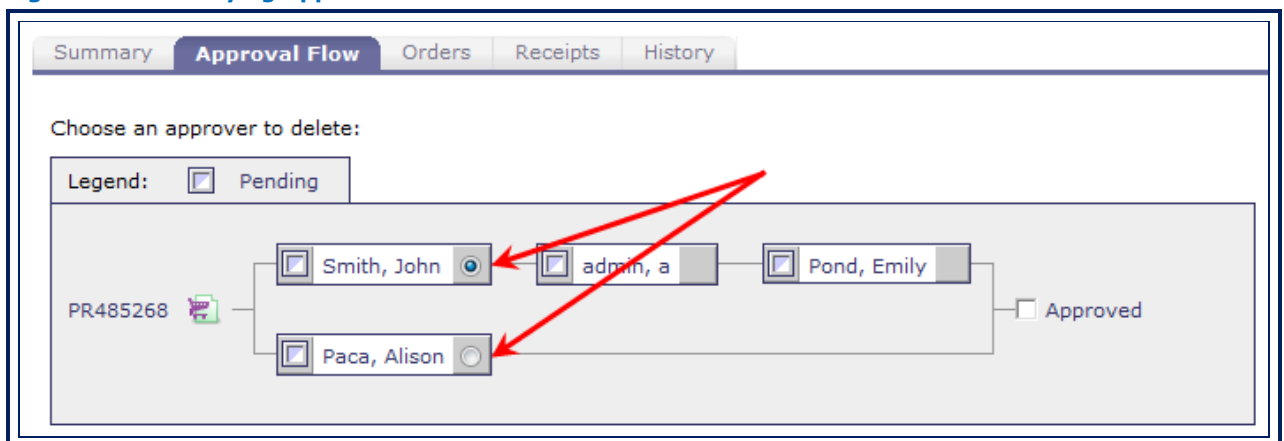
1. Use the drop-down list to select the name of the individual you want to add (or choose *Search for more...* to find a name that does not appear in the drop-down list). You can add multiple approvers; just return to the drop-down list and select another name.
2. Indicate whether that person will be an approver or a watcher. Be aware that the role you select will be applied to all users listed in the **Add approver to the approval flow** fields. If you want to add both approvers and watchers, follow these steps to add the first group of users (for example, approvers), then return to step 1 and add the second group.
3. After you select at least one name and indicate the role to be assigned, you have the option to add a reason for the addition.
4. Last, indicate whether you want the new approver to be added as the first approver, or in parallel to the existing approval flow (Figure 73). Adding the new approver to the beginning of the flow stops the process until that person approves the requisition; if you add the new approver in parallel, the review process can go forward without delay.

Figure 73: Approval Flow Positions for Ad Hoc Approvers



You can delete only the approvers and watchers that you added. You cannot delete required approvers. Begin by clicking the **Delete Approver** button located under the approval flow (Figure 71). Approvers and watchers that you added will display with radio buttons, allowing you to select one at a time for deletion (Figure 74).

Figure 74: Identifying Approvers for Deletion

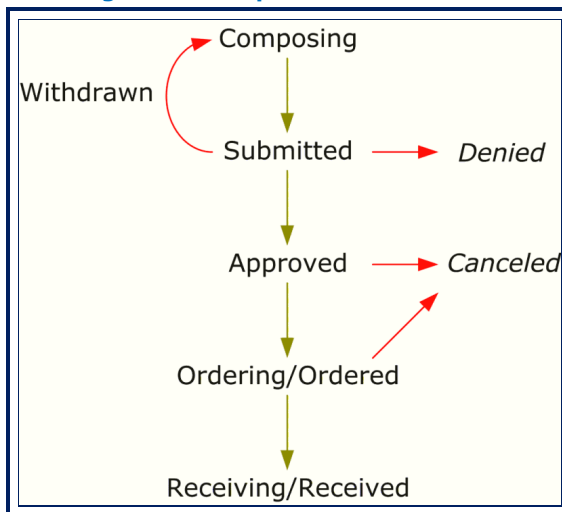


UNDERSTANDING REQUISITION STATUS

The Order process begins with the requisition and ends when the supplier is paid for the items received.

Each step in the process changes the status of the request (Figure 75). There is a standard path that most requisitions will follow. There are also alternative paths a requisition might take that differ from the usual flow.

Figure 75: Requisition Status Flow



eVA can be configured to automatically keep the relevant parties informed by sending notification messages as a request flows through the approval process. You can also check on the status of your requisition via the **My Documents** list on the **DASHBOARD**.

Figure 76: Requisition Status Displayed in My Documents List






My Documents				
ID	Title	Date ↓	Status	
 PR484948-V2	Govt Ctr - Printers	6/12/2014	Receiving	
 PR487780	Copier Maintenance	3/19/2014	Composing	
 PR487772	Office Equipment, Maple Ave.	3/17/2014	Composing	
 PR485471	Copy of Printer Maint - DHS	4/12/2013	Ordered	
 PR485365-V2	Copy of Printer Supplies Req	4/12/2013	Received	

Table 10 explains the meaning of the various eVA requisition statuses.

Table 10: Explanation of Requisition Status

Status	Description
Composing	The preparer is still working on the requisition, which has been saved but not submitted. <ul style="list-style-type: none"> Only the preparer of a requisition can submit it.
Collaboration	This status is specific to Ariba Category Procurement (ACP) transactions. It indicates that the requisition is in the collaboration period between <i>Composing</i> and <i>Submitted</i> .



Status	Description
Submitted	<p>The requisition has been submitted and is in the approval process (neither fully approved nor denied). A requisition in <i>Submitted</i> status cannot be changed, but the preparer can withdraw it. A requisition remains in <i>Submitted</i> status until one of the following occurs:</p> <ul style="list-style-type: none">• Everyone listed on the Approval Flow approves the requisition (status changes to <i>Approved</i>)• Any approver denies the requisition (status changes to <i>Denied</i>)• Preparer withdraws the requisition (status changes back to <i>Composing</i>)
Denied	<p>A required approver has denied the requisition. The requisition remains in <i>Denied</i> status until:</p> <ul style="list-style-type: none">• The preparer withdraws the requisition (status changes back to <i>Composing</i>)• The preparer resubmits the requisition (status changes back to <i>Submitted</i>)
Approved	<p>All required approvers have approved the requisition or eForm.</p> <ul style="list-style-type: none">• An eForm can be in <i>Approved</i> status in the normal course of processing.• For a purchase requisition, <i>Approved</i> status indicates a problem. Contact eVA Customer Care at 1-866-289-7367 for help.
Ordering	<p>An approved requisition is generating one or more orders. Requisitions usually remain in <i>Ordering</i> status for a short time, while one or more orders are being generated and transmitted.</p> <ul style="list-style-type: none">• When all orders have been transmitted successfully, the requisition moves to <i>Ordered</i> status.• Occasionally a request will linger in <i>Ordering</i> status; for example, when there is a problem transmitting the order to the supplier.• If a requisition stays in <i>Ordering</i> status longer than a half hour, contact eVA Customer Care at 1-866-289-7367 for help.
Ordered	<p>The items on the requisition were successfully converted to one or more orders. A requisition stays in <i>Ordered</i> status until one of the following happens:</p> <ul style="list-style-type: none">• Receiving is performed against the order, putting it in <i>Receiving</i> or <i>Received</i> status, or• The preparer cancels the requisition. The state of both the original requisition and any associated orders change to <i>Canceling</i> or <i>Canceled</i> status.
Canceling	<p>The preparer canceled the requisition after the order was created. Requisitions usually remain in <i>Canceling</i> status for a short time while eVA transmits the cancellation and confirms that it has been transmitted successfully.</p> <ul style="list-style-type: none">• When the cancellation order has been placed, the requisition transitions to <i>Canceled</i> status.• Sometimes a request may linger in <i>Canceling</i> status; for example, when eVA is communicating with the supplier by fax and there is a transmission error. If the requisition stays in <i>Canceling</i> status longer than a half hour, contact eVA Customer Care at 1-866-289-7367 for help.• <i>Canceling</i> status applies to both the original requisition and to all associated orders. <p>Warning: Canceling a requisition will cancel all orders created from it. If you are trying to cancel one of multiple orders from a single requisition, use the Change Order functionality instead to delete the applicable lines.</p>
Canceled	<p>The preparer canceled the requisition after it was approved and orders were created. Cancellation applies to both the original requisition and its associated orders.</p> <ul style="list-style-type: none">• When a requisition has been canceled, users can take no further actions. <p>Warning: Both the original requisition and its associated orders remain in <i>Canceled</i> status. If you want to change and re-issue the requisition, be sure to copy the requisition before you cancel it.</p>

CREATING A PURCHASE REQUISITION

Status	Description
Receiving	<p>Some receiving has occurred, but not all. For example, partial receipts have been completed for some order line items, or items have been rejected.</p> <ul style="list-style-type: none">• A request might remain in <i>Receiving</i> status for an extended period of time until all receipts are completed.• A receiver can close an order for receiving before all items have been received. Customer Care recommends creating a change order to reconcile the final order with the amount received.
Received	<p>The order is closed; a requisition has been submitted and approved, the order has been sent, and the goods have been shipped and received.</p> <ul style="list-style-type: none">• When a request reaches <i>Received</i> status, it is final and no change orders can be processed. However, the order can be reopened so that a change order can be created.

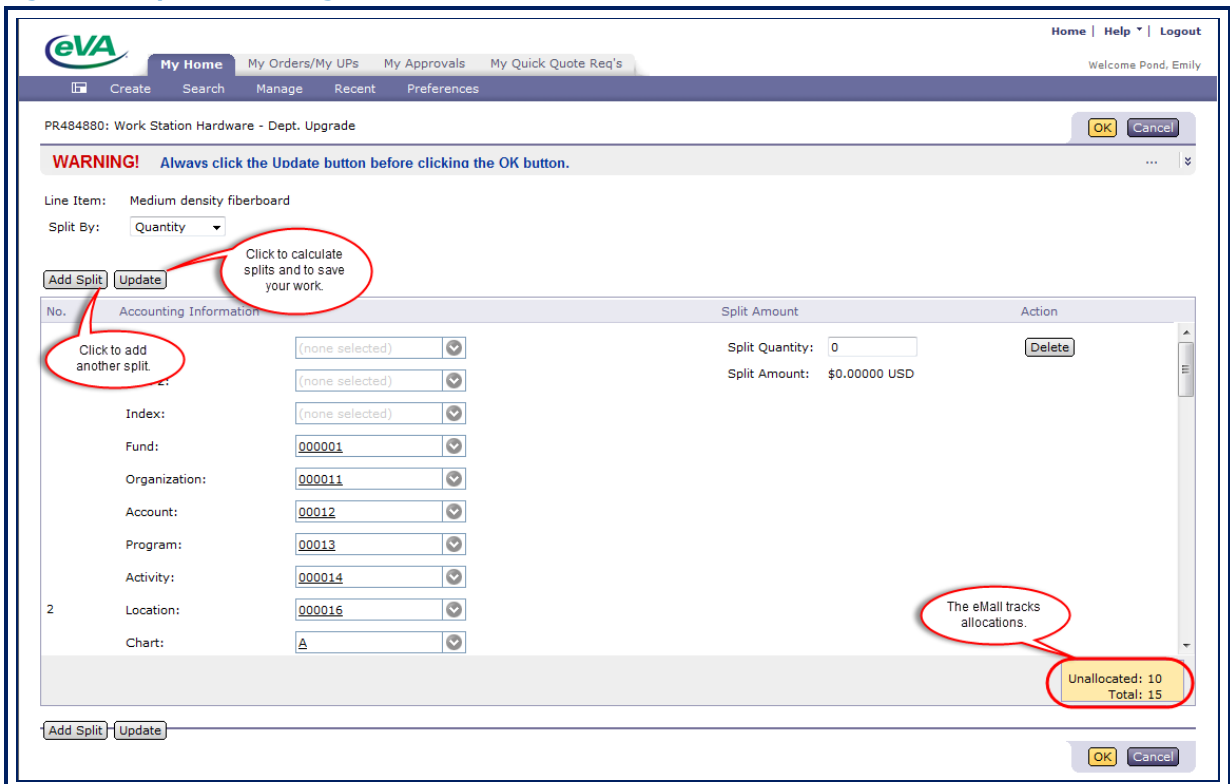
7. SPLIT ACCOUNTING

Split accounting allows you to share the cost of an item between two or more accounting groups. For example, if a new printer will be used by several departments, you can use split accounting to share the cost of the printer among those departments.

To implement split accounting for a line item, select the item from the **Summary** tab or from your shopping cart and click **Edit** to open the **EDIT LINE ITEM** screen. Click the **Split Accounting** button located at the bottom of the **ACCOUNTING – BY LINE ITEM** section (Figure 56).

When the **SPLIT ACCOUNTING** screen opens (Figure 77), it will display two accounting splits with identical information (matching the values entered in the **ACCOUNTING – BY LINE ITEM** section).

Figure 77: Split Accounting Screen



PR484880: Work Station Hardware - Dept. Upgrade

WARNING! Always click the Update button before clicking the OK button.

Line Item: Medium density fiberboard
Split By: Quantity

Add Split Update

Click to calculate splits and to save your work.

No.	Accounting Information	Split Amount	Action
1	Index: (none selected) Fund: 000001 Organization: 000011 Account: 00012 Program: 00013 Activity: 000014	Split Quantity: 0 Split Amount: \$0.00000 USD	Delete
2	Location: 000016 Chart: A		

Click to add another split.

The eMall tracks allocations.

Unallocated: 10
Total: 15

Add Split Update

OK Cancel

EDITING LINE ITEMS

Begin by selecting the method you will use to allocate line charges, as shown in **Figure 78**. If you need more splits, click **Add Split** until you have the number you want.

Figure 78: Choose from Three Calculation Methods

Method	Amount
Split By: <input type="text" value="Amount"/>	Split Amount: <input type="text" value="\$1,600.00000"/>
Split By: <input type="text" value="Percentage"/>	Split Percentage: <input type="text" value="100%"/> Split Amount: \$1,600.00000 USD
Split By: <input type="text" value="Quantity"/>	Split Quantity: <input type="text" value="10"/> Split Amount: \$1,600.00000 USD

eVA will keep track of your allocations to each split to ensure that the funds are fully allotted.

Figure 79: Split Accounting Allocation Totals

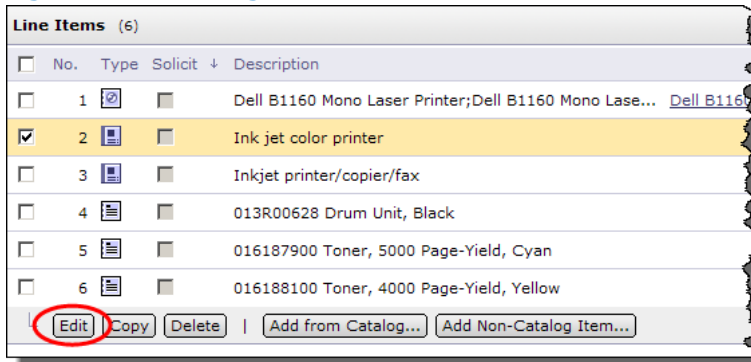
No.	Accounting Information	Split Amount	Action
1	Field 1: <input type="text" value="0100"/> Field 2: <input type="text" value="(none selected)"/> Index: <input type="text" value="(none selected)"/> Fund: <input type="text" value="000001"/> Organization: <input type="text" value="000011"/> Account: <input type="text" value="00012"/> Program: <input type="text" value="00013"/> Activity: <input type="text" value="000014"/> Location: <input type="text" value="000016"/> Chart: <input type="text" value="A"/> VITA Department: <input type="text" value="321"/> VITA Account/SubObject: <input type="text" value="1312"/> VITA Fund: <input type="text" value="0613"/> VITA Program: <input type="text" value="82001"/> VITA Billing Element: <input type="text" value="50040"/> VITA Project: <input type="text" value="1111"/> Agency Use: <input type="text"/>	Split Percentage: <input type="text" value="50%"/> Split Amount: \$800.00000 USD	<input type="button" value="Delete"/>
		Unallocated: 50% Total: 50%	

To check your allocations, click **Update**. The amount that remains unallocated and the total amount assigned will be displayed (**Figure 77**). When you have finished assigning funds among the splits, click **Update** and then click **OK** to return to the **EDIT LINE ITEMS** screen.

8. EDITING LINE ITEMS

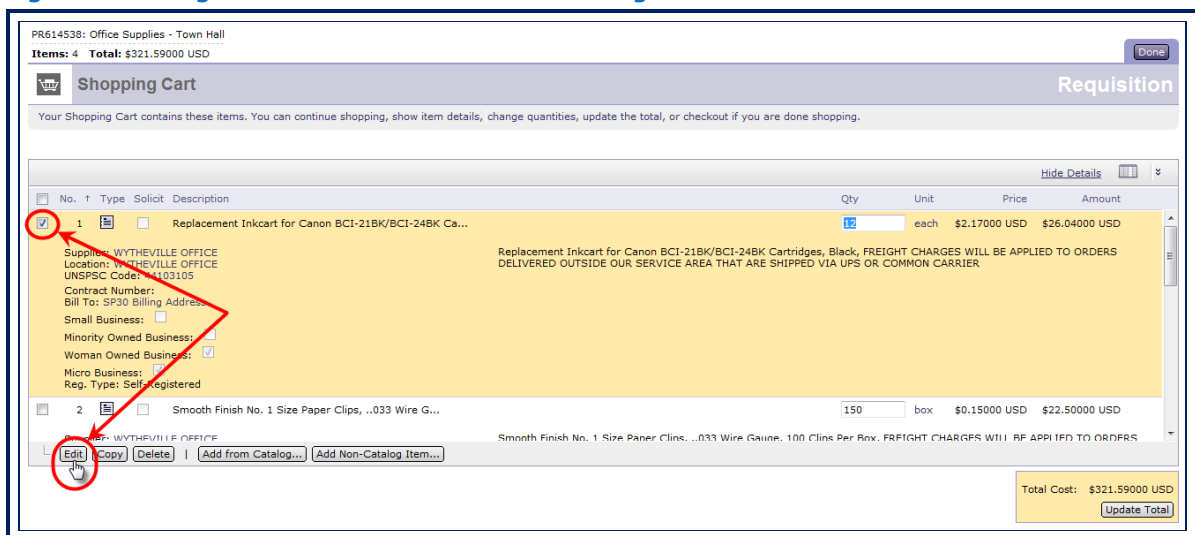
You can access complete information for any line item from the **LINE ITEMS** section of the **Summary** tab (Figure 80).

Figure 80: Accessing Line Item Details



Another path to the **EDIT LINE ITEM** screen is from your shopping cart, as shown in Figure 81. In either case, select the checkbox next to the appropriate line item and click **Edit**; the **EDIT LINE ITEM** screen will open.

Figure 81: Using the Edit Function to Add Accounting Information



You can elect to edit multiple line items simultaneously, provided you want to make the same change to each line item; simply select all the line items you want to change before clicking **Edit**. For more information, see [Mass Editing](#). Note that some fields are not eligible for mass editing. See [Table 11](#) for information on individual fields.

The **EDIT LINE ITEM** screen comprises five sections:

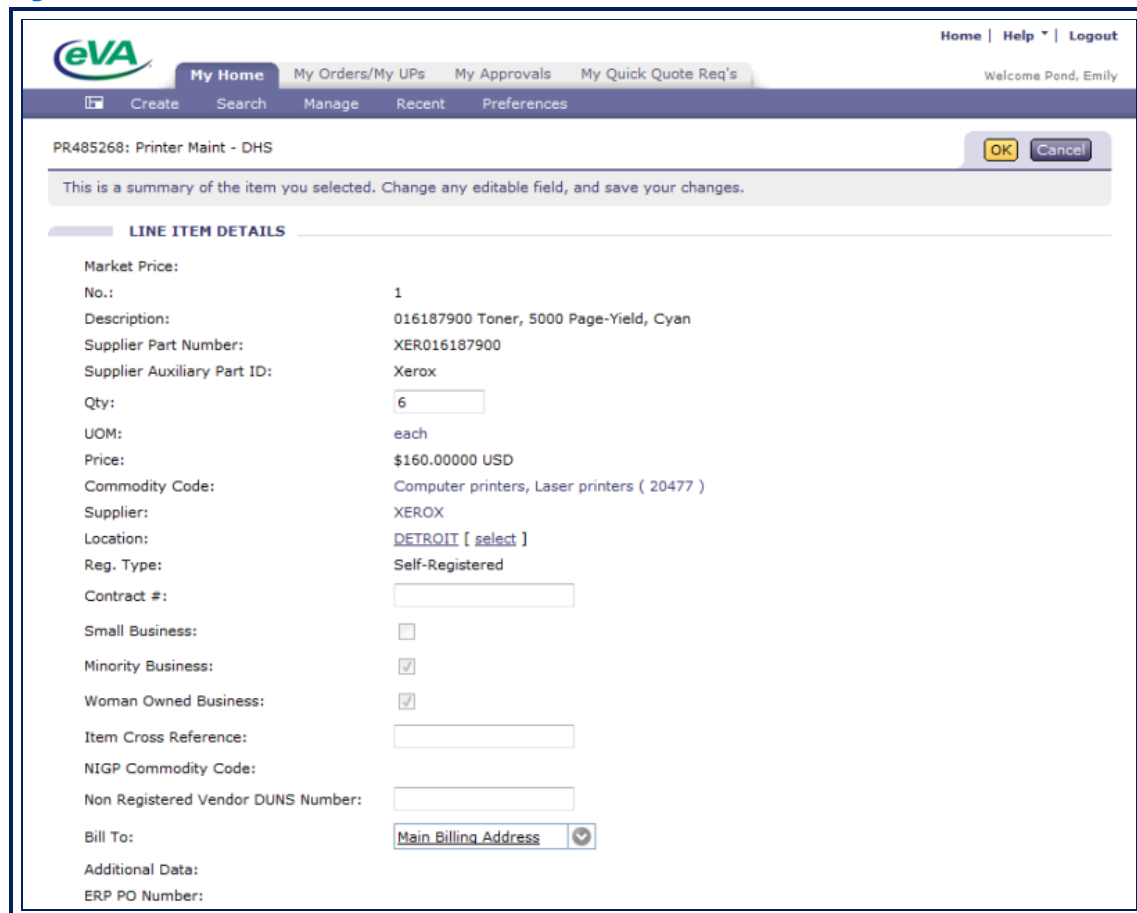
- Line Item Details
- Accounting – By Line Item
- Shipping – By Line Item
- Comments – By Line Item
- Attachments – By Line Item

In order for the screen shots to be readable, we will examine this screen one section at a time; just be aware that all of the above-listed sections appear on a single, scrollable screen.

LINE ITEM DETAILS

The information in the **LINE ITEM DETAILS** section comes from catalog and supplier data coupled with your specifications regarding quantity, ordering location, and other options when applicable (**Figure 82**). Some information, such as the **Bill To** address, may be pre-populated if your agency/entity has set up default values for your BSO profile. In the case of non-catalog items and unregistered suppliers, the data you entered during item and supplier setup is displayed here.

Figure 82: Line Item Details Section of Edit Line Items Screen



PR485268: Printer Maint - DHS

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM DETAILS

Market Price:	
No.:	1
Description:	016187900 Toner, 5000 Page-Yield, Cyan
Supplier Part Number:	XERO16187900
Supplier Auxiliary Part ID:	Xerox
Qty:	6
UOM:	each
Price:	\$160.00000 USD
Commodity Code:	Computer printers, Laser printers (20477)
Supplier:	XEROX
Location:	DETROIT [select]
Reg. Type:	Self-Registered
Contract #:	
Small Business:	<input type="checkbox"/>
Minority Business:	<input checked="" type="checkbox"/>
Woman Owned Business:	<input checked="" type="checkbox"/>
Item Cross Reference:	
NIGP Commodity Code:	
Non Registered Vendor DUNS Number:	
Bill To:	Main Billing Address
Additional Data:	
ERP PO Number:	

Table

11 lists the editable fields in this section and indicates whether each field can be included in a mass edit. Note that this information applies only to hosted catalog items. For PunchOut catalog items, see [Editing PunchOut Catalog Items](#).

Table 11: Editable Line Item Detail Fields

Field	Definition	Mass Edit?
Qty:	<ul style="list-style-type: none"> Quantity to be purchased. 	No
Receiving Method*	<ul style="list-style-type: none"> Indicates whether the line item will be received by quantity or amount. 	Yes
Location:	<ul style="list-style-type: none"> Supplier location from which you want the item to be shipped. <p>This field is available for mass edits ONLY for items from the same supplier.</p>	Yes
Contract #:	<ul style="list-style-type: none"> May be auto-populated or entered manually 	Yes
Item Cross Reference	<ul style="list-style-type: none"> Used as a reference field for incoming import transactions. Example: When a Quick Quote is awarded, the Quick Quote Award number populates this field. 	No
Non Registered Vendor DUNS Number:	<ul style="list-style-type: none"> Can be entered manually when your chosen vendor is not registered in eVA. 	No
Bill To:	<ul style="list-style-type: none"> When more than one authorized billing address exists for your entity/agency, choices will be presented in a drop-down list. This field cannot be edited when only one billing address exists in the eMall 	Yes

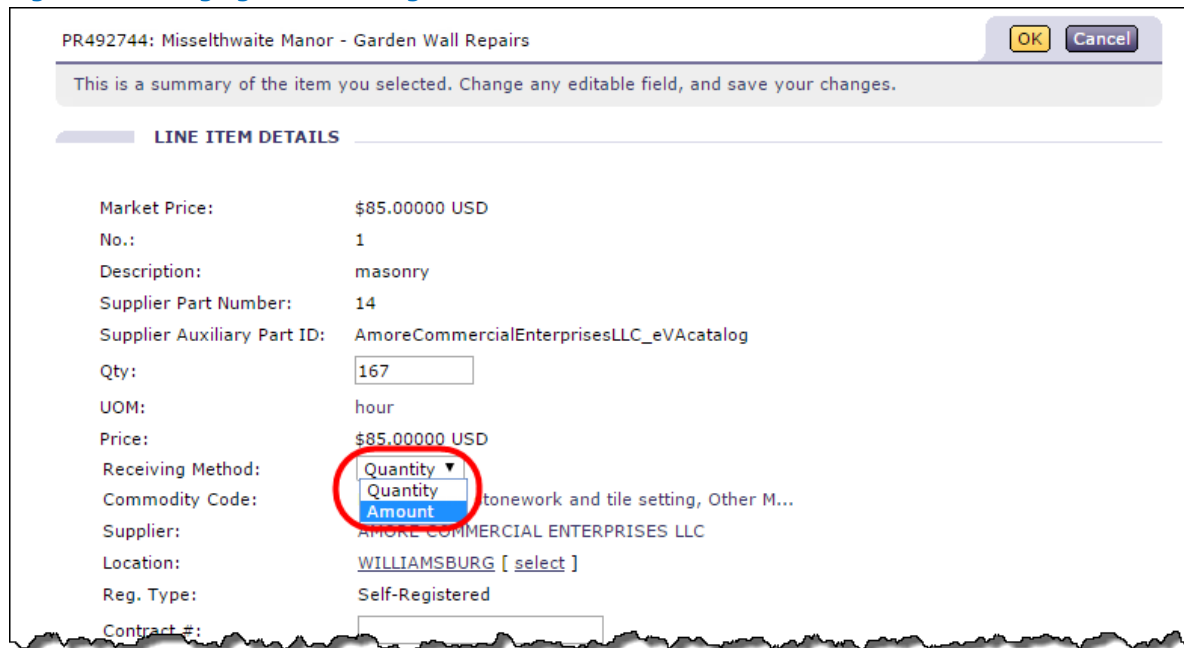
*Not activated by all agencies.

RECEIVING BY AMOUNT

The capability exists in the eMall to receive orders by monetary amounts (*Receive by Amount*) instead of by number of items (*Receive by Quantity*), although not all agencies have chosen to make this option available. The ability to receive by amount is used primarily to receive services (for example, paper shredding or building maintenance) rather than tangible items. It is permissible to have both *Quantity* and *Amount* line items on the same request, but you cannot change the Receiving Method after you have submitted the request, except by creating a Change Order.

If you are responsible for procuring these kinds of services, and your agency has not activated Receive by Amount, contact your eVA Administrator. (Note that Receive by Amount does not apply to services provided by temporary staff or medical staff consultants. For information on those types of services, see [Chapter 9: Creating a Temporary Labor Request](#).)

If your agency has activated Receive by Amount, that option will be available in a drop-down list on the **LINE ITEM DETAILS** screen, as shown in **Figure 83**. As noted above in **Table 11**, the **Receiving Method** field is available for mass edits.

Figure 83: Changing the Receiving Method


PR492744: Misselthwaite Manor - Garden Wall Repairs

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM DETAILS

Market Price:	\$85.00000 USD
No.:	1
Description:	masonry
Supplier Part Number:	14
Supplier Auxiliary Part ID:	AmoreCommercialEnterprisesLLC_eVAcatalog
Qty:	167
UOM:	hour
Price:	\$85.00000 USD
Receiving Method:	Quantity
Commodity Code:	Quantity
Supplier:	AMORE COMMERCIAL ENTERPRISES LLC
Location:	WILLIAMSBURG [select]
Reg. Type:	Self-Registered
Contract #:	






NOTE: You cannot Receive by Amount any line item that has a negative amount. Attempting to do so will trigger an error message upon submission.

SHIPPING – BY LINE ITEM

The next section of the **EDIT LINE ITEMS** screen concerns shipping. **Figure 84** shows the shipping instructions for the entire requisition on the left and customized shipping instructions for a single line item on the right. Any or all of the three shipping fields can be different from those entered at the *Entire Requisition* level.

The requisition-level shipping information includes a check box, **See Line Item Shipping Details**. When the check box is selected, it alerts the vendor to the need to ship to more than one location. Any time you add shipping instructions at the line item level, this check box is automatically selected.

Figure 84: Line Item with Customized Shipping Instructions

Requisition Level Shipping Information	Line Item Level Shipping Information
<div> <div>SHIPPING - ENTIRE REQUISITION</div> <div> <div>See Line Item Shipping Details: </div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Ship To:</div> <div>Richmond_Location</div> </div> <div> <div>Deliver To:</div> <div>Emily Pond</div> </div> <div> <div>Need-by Date: </div> <div>Wed, 15 Oct, 2014</div> </div> </div>	<div> <div>SHIPPING - BY LINE ITEM</div> <div> <div>Ship To:</div> <div>Providence_Location</div> </div> <div> <div>Deliver To:</div> <div>Oswin Oswald</div> </div> <div> <div>Need-by Date: </div> <div>Thu, 23 Oct, 2014</div> </div> </div>

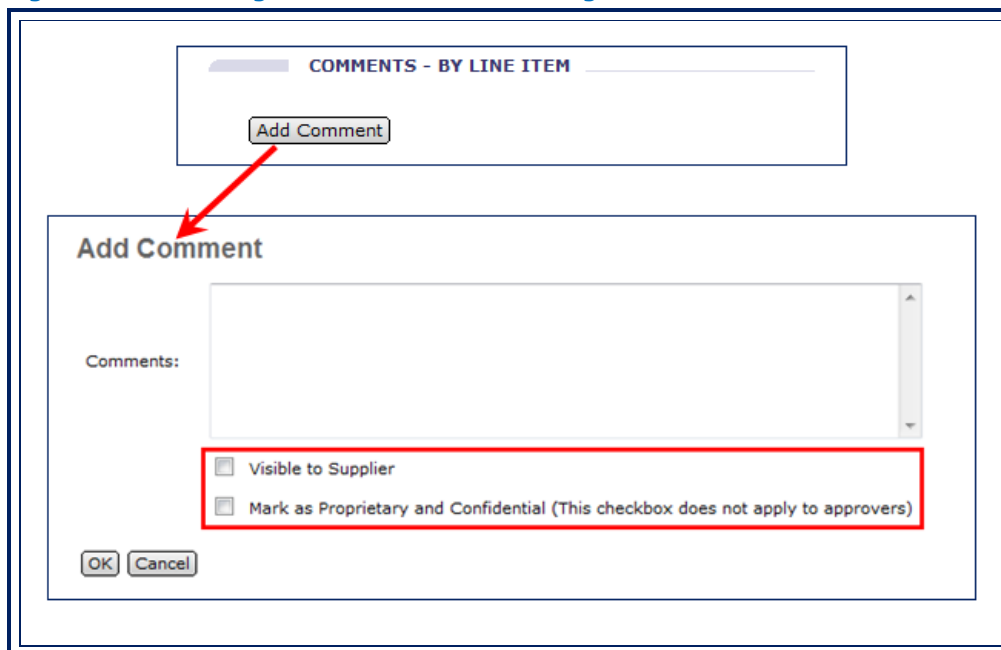
The eMall lets you designate a different shipping destination for each line item on your requisition, should you want to do so (provided your agency/entity has a sufficient number of valid shipping locations), but you cannot split delivery of articles within a line item. You must create two line items if you want the supplier to deliver to two locations.

COMMENTS – BY LINE ITEM

You can add comments to a line item to provide additional details about your request; to do this, click the **Add Comment** button in the **COMMENTS - BY LINE ITEM** section (Figure 85).

Just like comments you add for the entire requisition, line item comments become a permanent part of the requisition. You can control who sees your comments by selecting one or both of the following check boxes:

- **Visible to Suppliers:** By default, comments appear on the requisition but not on the purchase order that is sent to the supplier. Select this check box if you want the supplier to see your comments on the purchase order.
- **Mark as Proprietary and Confidential:** By default, your comments can be viewed by anyone internal to your agency/entity who has access to the requisition. Select this check box to limit internal access to yourself and Approvers. Approvers can always view your comments; they can also add their own comments to the request.

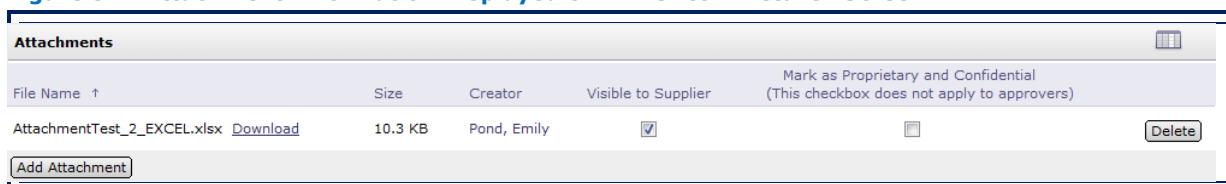
Figure 85: Launching the "Add Comment" Dialog Box


When you have entered your comment, click **OK** to return to the **LINE ITEM DETAILS** screen. Your time-stamped comment will be displayed there (**Figure 86**), and you will be able to edit or delete it from the **LINE ITEM DETAILS** screen.

Figure 86: Saved Line Item Comment


ATTACHMENTS – BY LINE ITEM

You can also add attachments specific to a line item. Click **Add Attachment** and follow the instructions given earlier in the section [Attachments – Entire Requisition](#). When you return to the **LINE ITEM DETAILS** screen, a link to your attachment will be displayed there, and you will be able to change viewing options or delete the attachment from that screen.

Figure 87: Attachment Information Displayed on "Line Item Details" Screen


File Name	Size	Creator	Visible to Supplier	Mark as Proprietary and Confidential (This checkbox does not apply to approvers)
AttachmentTest_2_EXCEL.xlsx Download	10.3 KB	Pond, Emily	<input checked="" type="checkbox"/>	<input type="checkbox"/>



NOTE: You can add multiple line item attachments, as well as attachments at the requisition level, but combined total attachment size must NOT exceed **10 MB**.









When you have completed all of your line item edits, click **OK** to review your modifications in the **CHECKOUT** screen.

EDITING PUNCHOUT CATALOG ITEMS

Because PunchOut catalogs do not actually reside in the eMall, you cannot edit PunchOut catalog items in your shopping cart (except for accounting information, which you can edit from the shopping cart). Just as you had to access the supplier's website to select goods from a PunchOut catalog, you must return to the supplier's website if you want to change your order.

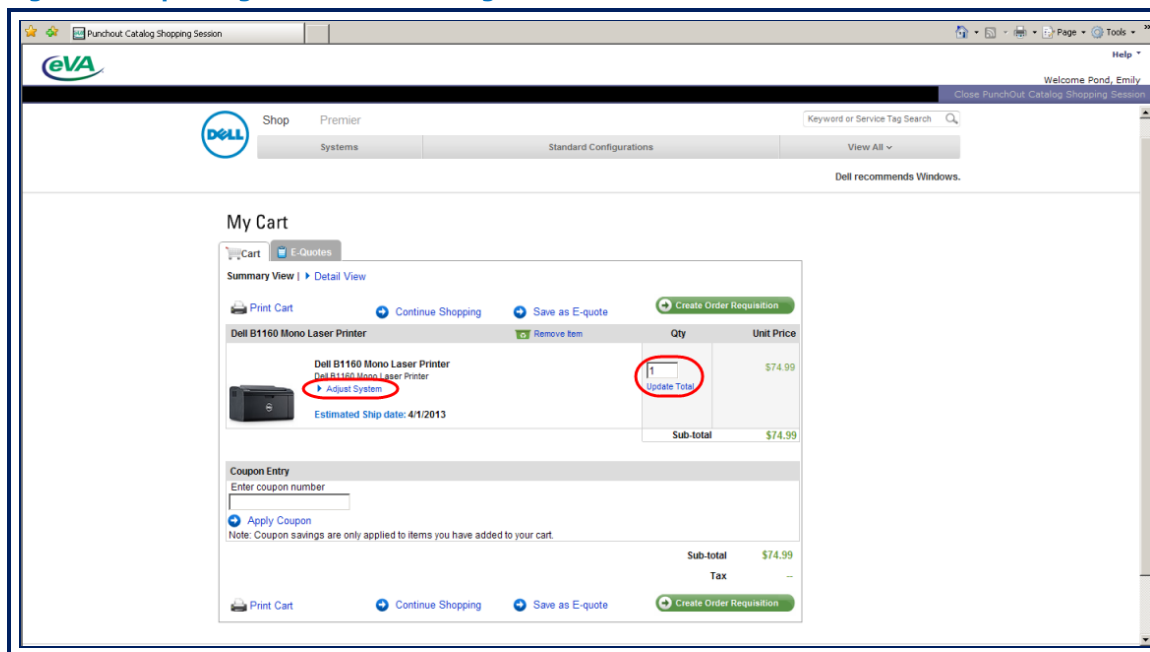
From the Line Items section of the Summary tab or from your shopping cart, locate the PunchOut catalog item you want to change and click the underlined description link, shown below in **Figure 88**.

Figure 88: PunchOut Items Link Back to the Catalog

Line Items (6)				
No.	Type	Solicit	Description	
1			Dell B1160 Mono Laser Printer;Dell B1160 Mono Lase... Dell B1160 Mono Laser Printer;Dell B1160 Mono...	
2			Ink jet color printer	
3			Inkjet printer/copier/fax	
4			013R00628 Drum Unit, Black	

In this example, the Dell catalog will open to show the B1160 Mono Laser Printer that is included in the requisition (**Figure 89**). Make your changes, making sure to follow any instructions for confirming those changes. When you are finished, click through the checkout process just as you did when you first selected the item. The changes you made will be reflected on your requisition.

Figure 89: Updating a PunchOut Catalog Item



Be aware that PunchOut catalogs differ from one another, just as one vendor's website differs from another's. Depending upon the catalog, you may find different buttons or links from those shown here.

MASS EDITING

Suppose you have been building a new requisition. You have added fifteen or twenty items to your shopping cart when you remember that half of the items need to be shipped to a different location. Instead of editing each item at the line level, you can save time by making the change to all of the items at once. You can edit any number of items this way, provided that you want to make the same changes to each one.

To edit multiple items at the same time, select each item you want to edit by clicking the checkbox next to it in the **Summary** tab or in your shopping cart. To edit **all** items at once, select the top checkbox, as indicated in **Figure 90**. When you have selected the items you want to update, click **Edit** to open the **MASS EDIT** screen.

Figure 90: Selecting Items for Mass Editing



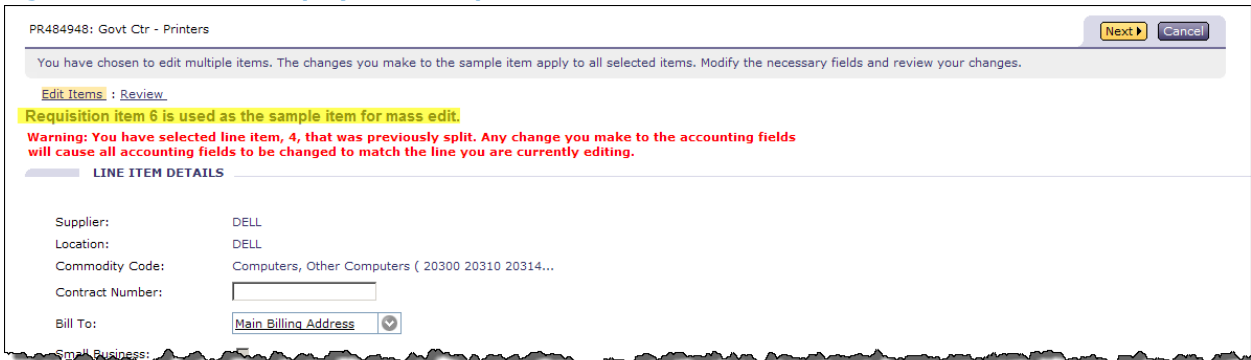
No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Ink jet color printer	4	each	\$149.99000 USD	\$599.96000 USD
2			Inkjet printer/copier/fax	3	each	\$539.69000 USD	\$1,619.07000 USD
3			013R00628 Drum Unit, Black	1	each	\$181.00000 USD	\$181.00000 USD
4			016187900 Toner, 5000 Page-Yield, Cyan	10	each	\$160.00000 USD	\$1,600.00000 USD
5			016188100 Toner, 4000 Page-Yield, Yellow	10	each	\$160.00000 USD	\$1,600.00000 USD
6			Dell B1160 Mono Laser Printer;Dell B1160 Mono Lase... Dell B1160 Mono Laser Printer;Dell B1160 Mono...	3	each	\$74.99000 USD	\$224.97000 USD

Total Cost: \$5,825.00000 USD

The **MASS EDIT** screen displays information for one of the selected line items to use as a change template. In the example shown in **Figure 91**, the sample item is Requisition Item 6. Any changes you make to this line item will be applied to all of the selected line items.

Pay attention to any warnings that appear on the **MASS EDIT** screen; they will help you to avoid accidentally editing line items. For example, the warning shown in **Figure 91** indicates that one of the selected line items includes split accounting. If you find that you have selected an item that you do not want to include in the mass edit, click **Cancel** to return to the line item list.

Figure 91: Line Item Displayed as Sample on Mass Edit Screen



PR484948: Govt Ctr - Printers

You have chosen to edit multiple items. The changes you make to the sample item apply to all selected items. Modify the necessary fields and review your changes.

[Edit Items](#) : [Review](#)

Requisition item 6 is used as the sample item for mass edit.

Warning: You have selected line item, 4, that was previously split. Any change you make to the accounting fields will cause all accounting fields to be changed to match the line you are currently editing.

LINE ITEM DETAILS

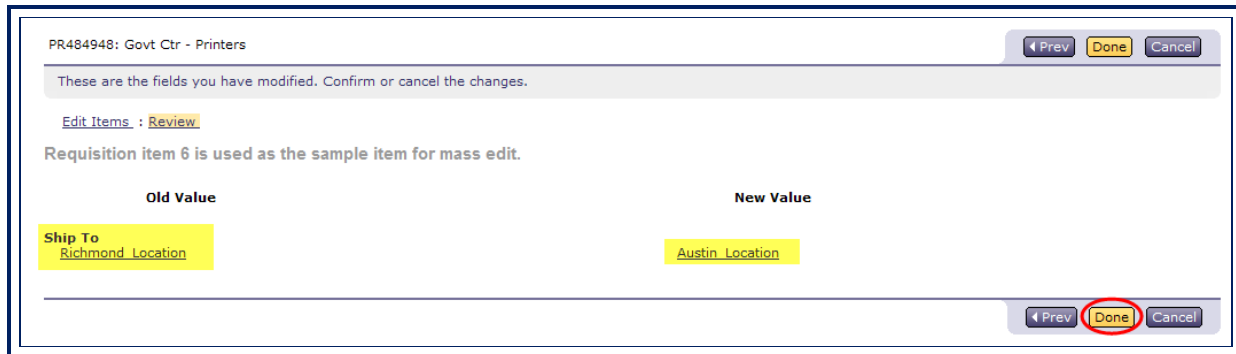
Supplier: DELL
Location: DELL
Commodity Code: Computers, Other Computers (20300 20310 20314...
Contract Number:
Bill To: Main Billing Address

When you have finished your edits, click **Next**.

REVIEW MODIFIED FIELDS

The **EDIT ITEMS: REVIEW** screen displays a summary of the fields that you changed, showing the old and new values for each one (Figure 92). This gives you an opportunity to review your changes before finalizing them.

Figure 92: Reviewing Mass Edits



PR484948: Govt Ctr - Printers

These are the fields you have modified. Confirm or cancel the changes.

[Edit Items](#) : [Review](#)

Requisition item 6 is used as the sample item for mass edit.

Old Value	New Value
Ship To Richmond Location	Austin Location

Navigation buttons: Prev, Done, Cancel

When you have finished reviewing your changes, click **Done** to return to the requisition **Summary** tab, where you can submit or exit the requisition.

9. CREATING A TEMPORARY LABOR REQUEST

There is a feature in the eMall that allows a buyer to work directly with contract vendors to procure certain kinds of labor, such as temporary administrative staffing and temporary medical staffing. Only authorized, contract vendors can participate in this process, which is called collaboration. (This feature is sometimes referred to as Ariba Category Procurement, or ACP.)

Collaboration lets eligible vendors review a buyer-defined set of skills and experience and then submit resumes of contractors who match those requirements. In addition to allowing for direct collaboration between buyers and vendors for resume submittal, this feature allows selected candidates to be set up in the eMall, where they can submit electronic time sheets to a designated supervisor for approval. In this kind of purchase, time sheets take the place of receipts, and eVA tracks the hours on each submitted time sheet against the total hours approved on the order.



NOTE: *-This feature also has the ability to handle collaboration for consulting services, but that service is not offered at this time.*

When a buyer requests temporary labor by adding qualified staffing services to the eMall shopping cart, the necessary workflow processes are generated to provide a working collaborative event between the vendor(s) and the buyer.

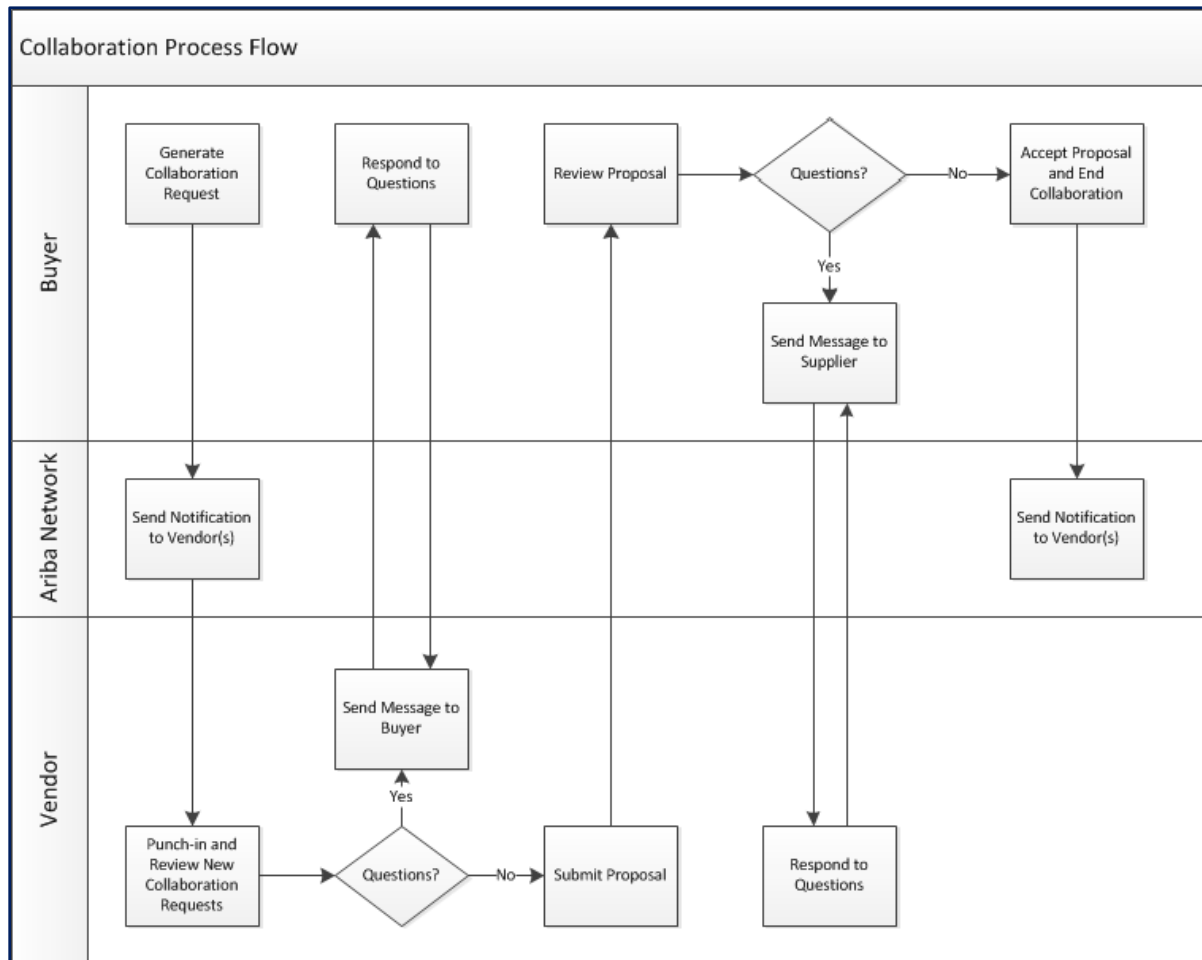
COLLABORATION OVERVIEW

Collaboration lets the buyer invite multiple vendors to respond to a request for temporary labor. Invited suppliers are notified when the buyer submits a requisition; they can then access the buyer's staffing requirements. . The suppliers can respond by sending resumes that the buyer accesses through the eMall requisition. The buyer compares responses from multiple vendors and makes a choice that represents the most advantageous balance of cost and skill.

If the buyer wants to engage a known individual for a temporary labor assignment, collaboration can be turned off on the requisition. The eMall will process the transaction as a standard, non-collaborative request.

Figure 93 provides a diagram of a basic collaboration request

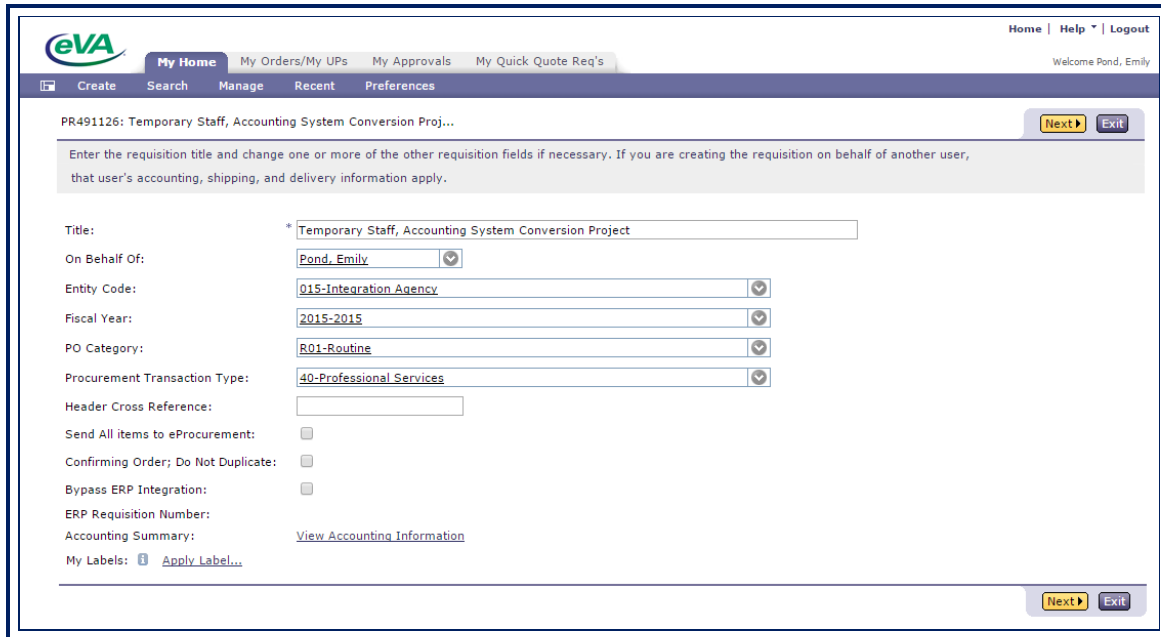
Figure 93: Collaboration Process Overview



CREATING A COLLABORATION REQUEST

A collaboration request begins as an ordinary requisition. Start by creating a new requisition, as detailed in *eMall User Guide Volume 1: Chapter 6, Creating a Purchase Requisition*.

Figure 94: Creating a Requisition for a Collaboration Request



PR491126: Temporary Staff, Accounting System Conversion Proj...

Enter the requisition title and change one or more of the other requisition fields if necessary. If you are creating the requisition on behalf of another user, that user's accounting, shipping, and delivery information apply.

Title: * Temporary Staff, Accounting System Conversion Project

On Behalf Of: Pond, Emily

Entity Code: 015-Integration Agency

Fiscal Year: 2015-2015

PO Category: R01-Routine

Procurement Transaction Type: 40-Professional Services

Header Cross Reference:

Send All items to eProcurement: ☐

Confirming Order; Do Not Duplicate: ☐

Bypass ERP Integration: ☐

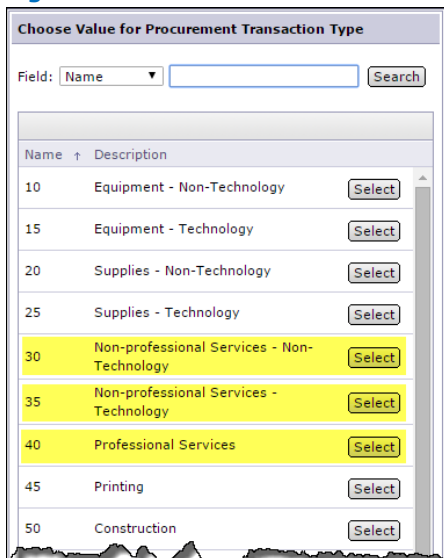
ERP Requisition Number:

Accounting Summary: [View Accounting Information](#)

My Labels: [Apply Label...](#)

Select an appropriate **Procurement Transaction Type** for a collaboration request; that will be one of the *Services* codes (Figure 95).

Figure 95: Collaboration Transaction Types



Choose Value for Procurement Transaction Type

Field: Name Search

Name	Description	Select
10	Equipment - Non-Technology	Select
15	Equipment - Technology	Select
20	Supplies - Non-Technology	Select
25	Supplies - Technology	Select
30	Non-professional Services - Non-Technology	Select
35	Non-professional Services - Technology	Select
40	Professional Services	Select
45	Printing	Select
50	Construction	Select

TEMPORARY LABOR REQUESTS

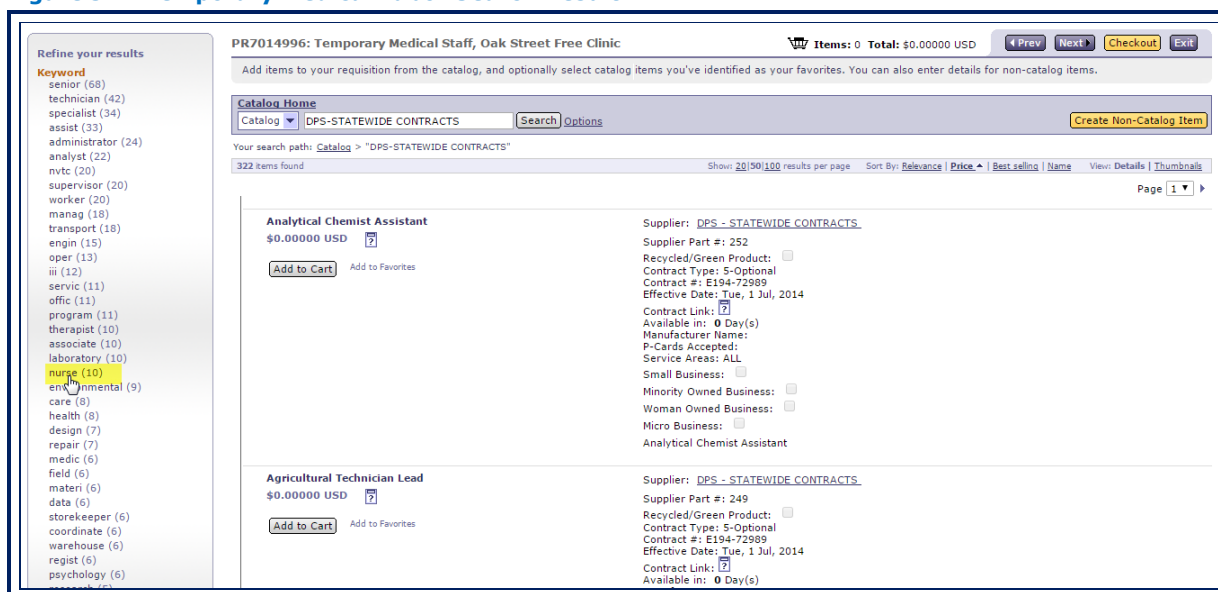
After you enter the necessary information on the **REQUISITION TITLE** screen, click **Next** to access the **CATALOG HOME** screen, and then drill down through the catalog screens. First, look for the catalog section titled *Management and Business Professionals and Administrative Services*, and click More ..., as shown in Figure 96.

Figure 96: Accessing Temporary Staffing Services



On the *Management and Business Professionals and Administrative Services* screen, locate Human resources services and click **Temporary personnel services**. This will bring you to a list of temporary personnel services by category, such as Temporary legal services, or Temporary financial services. In this example, Temporary medical services has been selected. Figure 97 shows partial results of this search.

Figure 97: Temporary Medical Labor Search Result



From the results screen, you can browse through job titles for the kind of staffer you need, or use the **Keyword** list on the left side of the screen to narrow your search as shown above in **Figure 97**. Another way to search for temporary workers is to enter DPS-STATEWIDE CONTRACTS in the **Catalog Search** field and then use the **Keyword** list to narrow your search. Catalog items for this type of contract will always show DPS as the supplier.

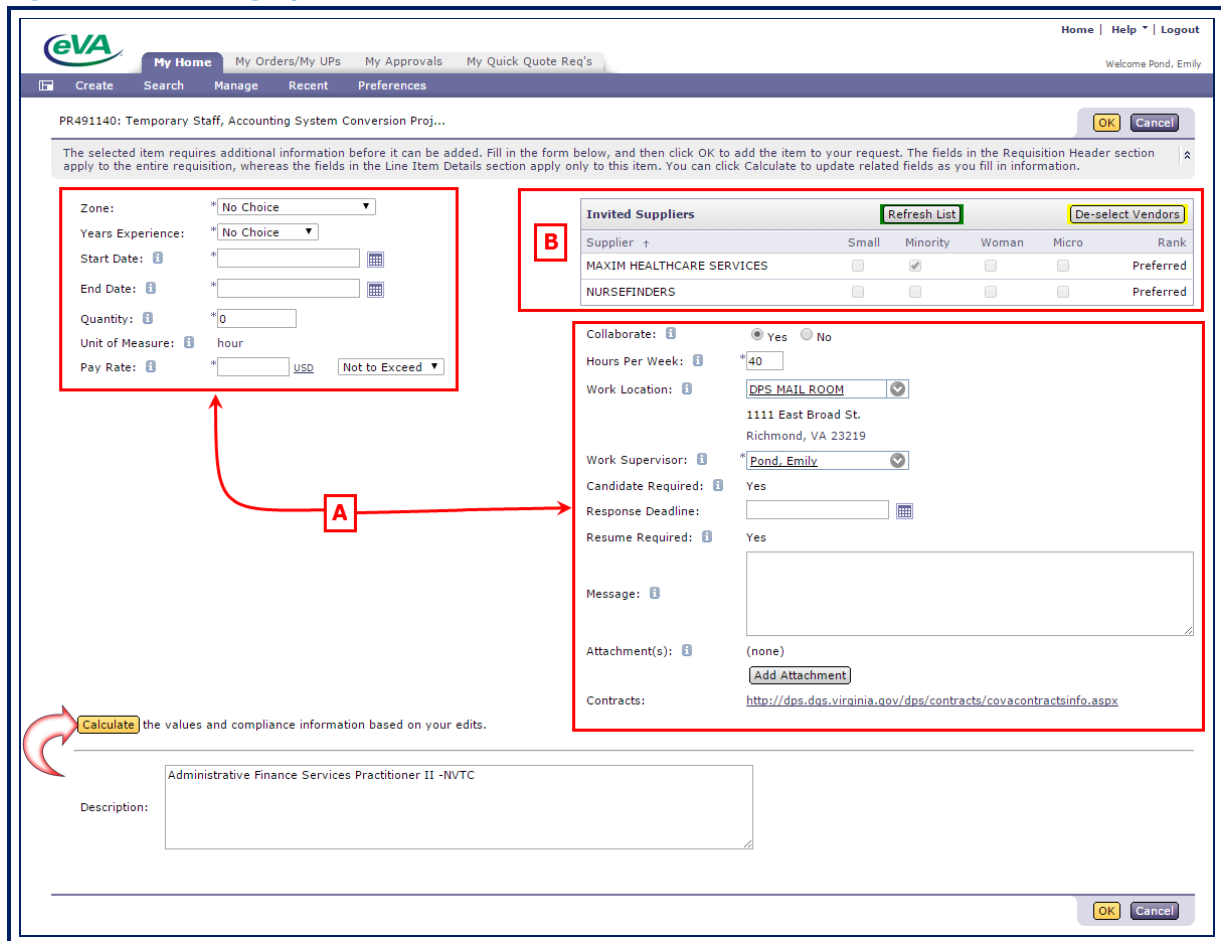
You can try entering a description of the type of worker needed in the **Catalog Search** field; for example, entering the words *Registered Nurse* or just *Nurse* brings back valid results. However, for most positions it is best to use this method only when you have the exact job title as shown in the contract.

When you find the appropriate job description, click **Add to Cart**.

THE DETAILS SCREEN

After you place an item in the Shopping Cart, you will be taken to the **DETAILS** screen to enter information specific to the position to be filled. **Figure 98** shows the **DETAILS** screen as it appears before information is entered, with only default selections displayed. The screen comprises a series of data entry fields (A) and the **Invited Suppliers** list (B).

Figure 98: The Category Details Screen



PR491140: Temporary Staff, Accounting System Conversion Proj...

The selected item requires additional information before it can be added. Fill in the form below, and then click OK to add the item to your request. The fields in the Requisition Header section apply to the entire requisition, whereas the fields in the Line Item Details section apply only to this item. You can click Calculate to update related fields as you fill in information.

Zone: * No Choice

Years Experience: * No Choice

Start Date: *

End Date: *

Quantity: * 0

Unit of Measure: hour

Pay Rate: * USD Not to Exceed

Invited Suppliers

Supplier	Small	Minority	Woman	Micro	Rank
MAXIM HEALTHCARE SERVICES		<input checked="" type="checkbox"/>			Preferred
NURSEFINDERS					Preferred

Collaborate: Yes No

Hours Per Week: * 40

Work Location: DPS MAIL ROOM
1111 East Broad St.
Richmond, VA 23219

Work Supervisor: * Pond, Emily

Candidate Required: Yes

Response Deadline:

Resume Required: Yes

Message:

Attachment(s): (none)
Add Attachment

Contracts: <http://dps.dps.virginia.gov/dps/contracts/covacontractsinfo.aspx>

Calculate the values and compliance information based on your edits.

Description: Administrative Finance Services Practitioner II -NUTC

A. Data Fields

The data fields in the two sections marked **A** in **Figure 98** collect information that can help a supplier identify appropriate candidates, such as the geographic area where the work will be performed and the amount of experience required. An asterisk (*) beside a field indicates the field is required. Refer to **Table 12** below for information about each field.

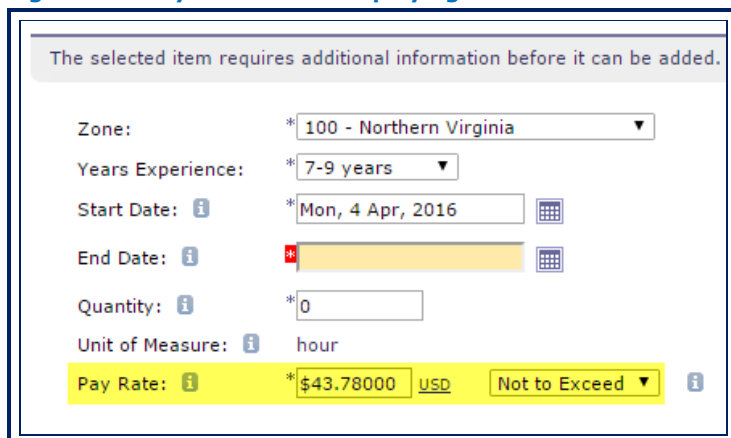
Table 12: Category Details Screen

Field	Required?	Description
Zone	Y	From the drop-down list, select the zone in which the contractor will be working.
Years Experience	Y	From the drop-down list, select the amount of experience a candidate must have. If no specific level of experience is required, select <i>Not-specified</i> . Do not leave the default setting of <i>No Choice</i> in place; doing so will trigger an error message.
Start Date:	Y	Use the calendar tool to select the date the contractor will start work, or type it into the text box.
End Date	Y	Use the calendar tool to select the date the engagement will end, or type it into the text box.
Quantity	Y	eVA calculates the number of pay units authorized for the engagement based on the Unit of Measure (usually hours), Hours Per Week (defaults to 40), and the start and end dates. If either or both of the dates change, eVA will automatically recalculate the Quantity .
Unit of Measure	N/A	The value displayed in this read-only field is set by eVA, based on the applicable contract.
Pay Rate	Y	The pay rate comprises two fields, the values of which are defined by the applicable contract. The first field shows the Pay Rate per Unit of Measure , expressed in U.S. dollars. The second field indicates whether that amount is <i>Fixed</i> or <i>Negotiable</i> , or if it represents the highest allowable amount (<i>Not to Exceed</i>). See More About Pay Rates , below.
Collaborate	N	This pair of option buttons defaults to Yes, but can be changed to <i>No</i> when collaboration is not needed (because a known candidate will be requested).
Hours Per Week	Y	This field defaults to the standard work week of 40 hours, but can be edited as needed. If the Hours Per Week change, click the Calculate button (indicated by a red arrow in Figure 98) to update the Quantity .

Field	Required?	Description
Work Location	N	When there is only one work location, it will be displayed here in read-only format. When there are multiple work locations, they will be presented in a drop-down list. Use the drop-down list to choose the location where the contractor will be working. If the contractor will work at multiple locations, choose the predominant location. After you make a selection, the street address will be displayed in read-only format below the location name.
Work Supervisor	Y	The name of the current, logged-on user will appear by default, but another name can be selected from the drop-down list or located using the <i>Search for more ...</i> functionality. The Work Supervisor will automatically appear on the approval flow of the contractor's time sheet.
Candidate Required	N/A	This read-only field is populated automatically as indicated by the contract.
Response Deadline	N	Enter the date by which invited suppliers must respond to the collaboration request.
Resume Required	N/A	This read-only field is populated automatically as indicated by the contract.
Message	N	Use this field to add information or instructions for the invited suppliers, such as specific skills required or agency-specific requirements such as drug testing or background check.
Attachment(s)	N	If one or more attachments have been added, the name(s) of the attached file(s) will appear here.
Contract(s)	N/A	eVA automatically provides links to the applicable contract or contracts.

More About Pay Rates

As shown in **Figure 98** above, when the **DETAILS** screen is displayed immediately after a temporary position has been added to the shopping cart, the dollar amount of the **Pay Rate** is blank, and the default qualifier (*Not to Exceed*) is displayed. After you complete the first few fields, the **Pay Rate** dollar amount (as determined by the contract) will be displayed; note that the qualifier might or might not update (**Figure 99**).

Figure 99: Pay Rate Fields Displaying Default Values


The selected item requires additional information before it can be added.

Zone: * 100 - Northern Virginia ▼

Years Experience: * 7-9 years ▼

Start Date: ⓘ * Mon, 4 Apr, 2016 📅

End Date: ⓘ * 📅

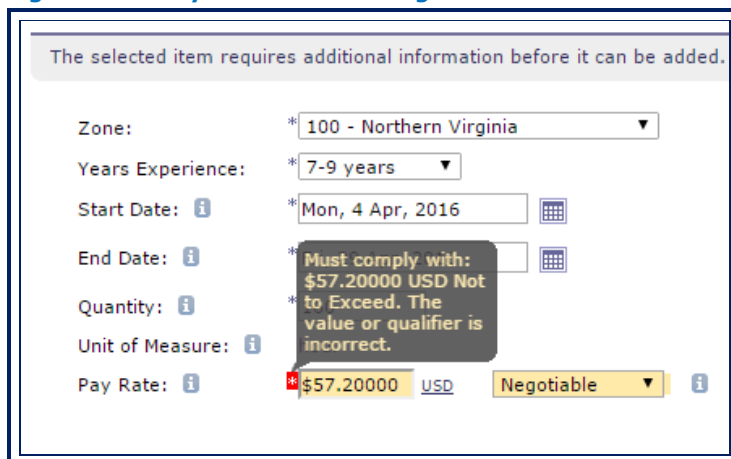
Quantity: ⓘ * 0

Unit of Measure: ⓘ hour

Pay Rate: ⓘ * \$43.78000 USD Not to Exceed ▼ ⓘ

Depending on the contract specifications, you might be able to change these settings. For example, if the **Pay Rate** defaults to *Not to Exceed \$18.5000*, you can set the amount to \$18.5000 or less.

If you make a change to the dollar amount or qualifier that violates the contract terms, the eMall will return an error message (**Figure 100**).

Figure 100: Pay Rate Error Message


The selected item requires additional information before it can be added.

Zone: * 100 - Northern Virginia ▼

Years Experience: * 7-9 years ▼

Start Date: ⓘ * Mon, 4 Apr, 2016 📅

End Date: ⓘ * 📅

Quantity: ⓘ *

Unit of Measure: ⓘ

Pay Rate: ⓘ * \$57.20000 USD Negotiable ▼ ⓘ

Must comply with:
\$57.20000 USD Not to Exceed. The value or qualifier is incorrect.

Keep in mind that the **Pay Rate** represents the amount the supplier will pay to the contractor. The amount billed to your agency will include the supplier's markup, which will be defined in the proposal.

B. Invited Suppliers List

The **Invited Suppliers** list displays suppliers currently on contract for the selected service. These are the suppliers who, by default, will be invited to provide a response to the Collaboration request. The list displays the suppliers' names, SWaM status, and rank (**Figure 101**).

Figure 101: Invited Suppliers Display

Invited Suppliers					
Refresh List					
De-select Vendors					
Supplier ↑	Small	Minority	Woman	Micro	Rank
MAXIM HEALTHCARE SERVICES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
NURSEFINDERS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred

There might be occasions when you do not want to include all suppliers on the Invited Suppliers list. Click **De-select Vendors** to open the **CHOOSE VALUES FOR INVITED SUPPLIERS** screen (Figure 102).

Figure 102: Add or Remove Invited Suppliers

Choose Values for Invited Suppliers

OK

Cancel

To add one or more values to the list of those currently selected, browse the values in the Add section or search for a specified value, and then click the value's check box. If pages of values are available, then when you navigate to another page, selected values in the Add section are automatically added to the list of currently selected values. To remove values from the list of those currently selected, click a value's check box to deselect it. When you are finished selecting or deselecting values, click **OK**.

Currently Selected					
<input checked="" type="checkbox"/> Supplier ↑	Small	Minority	Woman	Micro	Rank
<input checked="" type="checkbox"/> MAXIM HEALTHCARE SERVICES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
<input checked="" type="checkbox"/> NURSEFINDERS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred

Add to Currently Selected					
<input type="checkbox"/> Supplier ↑	Small	Minority	Woman	Micro	Rank
No items					

OK

Cancel

To remove a supplier from the list, clear the check box beside the supplier's name in the **Currently Selected** list. When you clear a check box, that supplier will move to the **Add to Currently Selected** list.



IMPORTANT: Always review contract for requirements regarding selecting the vendor with the lowest markup.

Only suppliers specifically named on a current contract are eligible to be invited to collaborate. To inquire about a particular vendor who does not appear as available, contact the DPS Sourcing Officer responsible for the contract. (Refer to the State Contracts List on the **eVA HOME** page).

MULTIPLE COLLABORATION LINE ITEMS

You can include multiple temporary labor collaboration line items on a single request, provided they fall under the same contract. For example, you can add multiple medical line items on a single request, but if you also need to request general labor items, the general items should go on a separate request. Submitting the Request

TEMPORARY LABOR REQUESTS

When you have finished adding items to your shopping cart, click **Next** on the **CATALOG HOME** screen to proceed to the **ACCOUNTING – BY LINE ITEM** screen. Make any necessary edits, including adding accounting splits if needed (see *eMall User Guide Volume 1, Chapter 7: Split Accounting*), and click **Next** again to see a summary of the requisition.

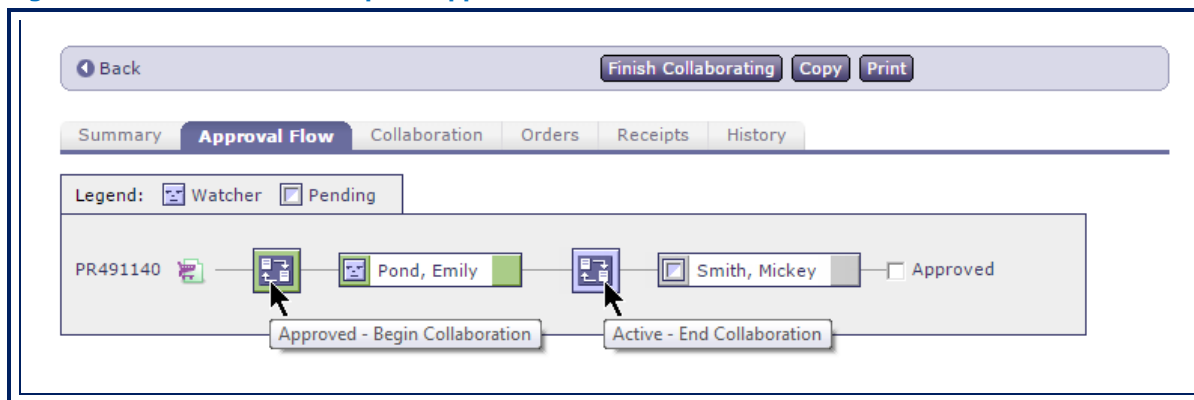
Review the summary carefully. When you are satisfied that you have included all of the information needed to respond to the request, click **Submit**. The request will move to *Collaborating* status, and the invited suppliers will receive email notification of a new Collaboration request in their Ariba Network mailboxes, provided they are set up to receive notifications in the AN. Vendors who have not completed this set-up will not receive emails and will require an alternate method of communication.

APPROVAL FLOW

When you view the **APPROVAL FLOW** tab for a Collaboration request, you will notice it is a little bit different from the standard requisition workflow. As shown in **Figure 103**, when Collaboration has been activated, it is reflected in the approval flow with **Begin Collaboration** and **End Collaboration** icons.

Approval might or might not be required to begin collaboration (pre-Collaboration); in **Figure 103**, the screen tip associated with the **Begin Collaboration** icon indicates that the request has been approved for collaboration. Depending on the Agency's policies, approval of the selected proposal might be required after Collaboration is complete (post-Collaboration).

Figure 103: Collaboration Request Approval Flow

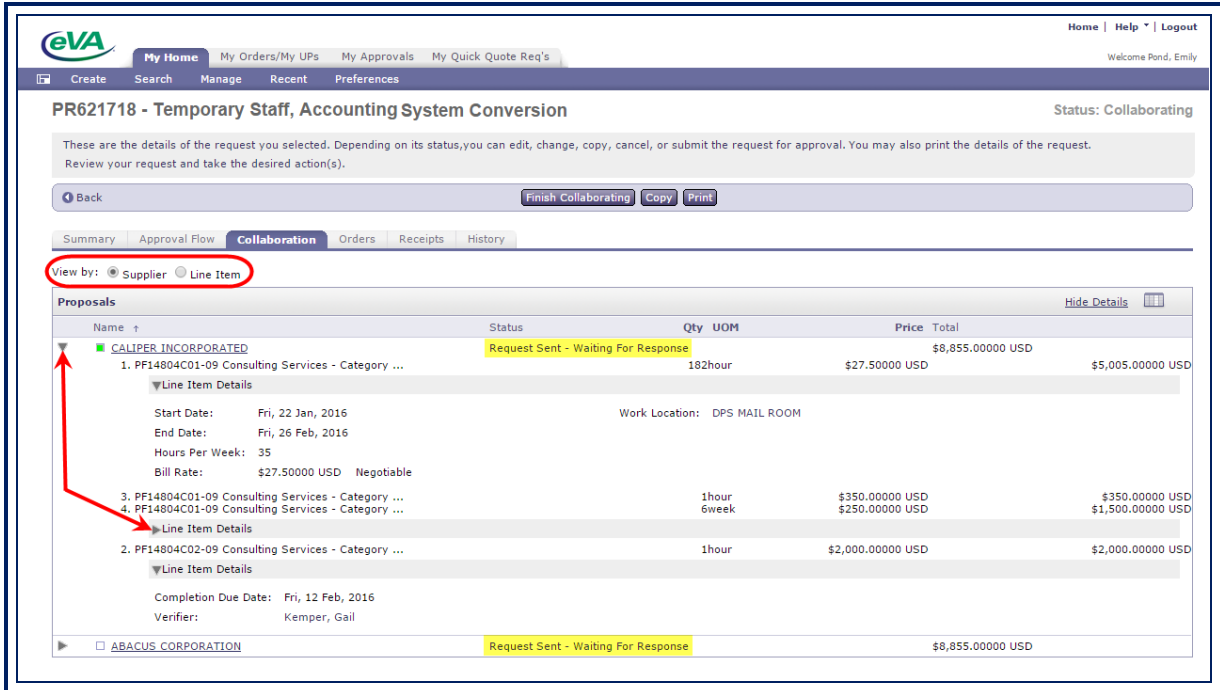


In the example shown in **Figure 103** above, the green Collaboration icon indicates the collaboration process has begun. The preparer (also marked with green) is a designated watcher during the Collaboration period. In this example, active approval is not required until Collaboration is complete (post-Collaboration). This is a common scenario, because frequently the actual dollar cost is not known until Collaboration is finished.

THE COLLABORATION TAB

When you look at the **REQUISITION** screen after you submit a Collaboration request, you will notice a new tab: the **COLLABORATION** tab, which appears between the **APPROVAL FLOW** and the **ORDERS** tabs, as shown in Figure 104.

Figure 104: Collaboration Tab



The screenshot displays the 'Collaboration' tab for requisition PR621718. The interface includes a navigation bar with tabs like 'My Home', 'My Orders/My UPS', 'My Approvals', and 'My Quick Quote Req's'. Below the navigation bar, there's a section for 'PR621718 - Temporary Staff, Accounting System Conversion' with a status of 'Collaborating'. A message states: 'These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).' Below this, there are buttons for 'Back', 'Finish Collaborating', 'Copy', and 'Print'. The main content area has tabs for 'Summary', 'Approval Flow', 'Collaboration' (selected), 'Orders', 'Receipts', and 'History'. Under the 'Collaboration' tab, there are 'View by' buttons for 'Supplier' (selected) and 'Line Item', which are circled in red. A red arrow points to the 'Supplier' button. The table below shows a list of suppliers and their proposals. The first supplier is CALPER INCORPORATED, with a status of 'Request Sent - Waiting For Response'. The table lists several line items with details like 'Start Date', 'End Date', 'Hours Per Week', 'Bill Rate', and 'Price Total'. The second supplier is ABACUS CORPORATION, also with a status of 'Request Sent - Waiting For Response'.

Name	Status	Qty	UOM	Price	Total
CALPER INCORPORATED	Request Sent - Waiting For Response	182	hour	\$27.50000 USD	\$5,005.00000 USD
1. PF14804C01-09 Consulting Services - Category ...		1	hour	\$350.00000 USD	\$350.00000 USD
4. PF14804C01-09 Consulting Services - Category ...		6	week	\$250.00000 USD	\$1,500.00000 USD
2. PF14804C02-09 Consulting Services - Category ...		1	hour	\$2,000.00000 USD	\$2,000.00000 USD
ABACUS CORPORATION	Request Sent - Waiting For Response				\$8,855.00000 USD

Figure 104 shows the **View by: Supplier** option of the **Collaboration** tab in the Buyer portal; the various suppliers that have been invited to collaborate are displayed, with line items appearing beneath the name of each invited supplier. Using the **View by:** option buttons (circled in red), you can change way information is organized onscreen. Use the arrow icons to expand and collapse various sections of the screen.

At first, the status of each supplier request will be *Request Sent – Waiting for Response*, as shown above. When invited suppliers respond, their status will update accordingly. Communication with vendors occurs through the Ariba Network (AN). A vendor in receipt of a Collaboration request has three possible responses. The vendor can:





- Send a message to the Buyer (to ask a question, for example).
- Decline the request.
- Respond with a proposal.

You can monitor vendor responses from the **COLLABORATION** tab. You can also send and receive messages, and review and act on proposals by accessing the suppliers' **Options** menu on the **COLLABORATION** tab.

MONITORING RESPONSES

It is easy to monitor supplier responses at a glance on the **COLLABORATION** tab. In addition to displaying the status of the request in text for each invited supplier, the eMall also employs color coded status indicators, as shown in Table 13.

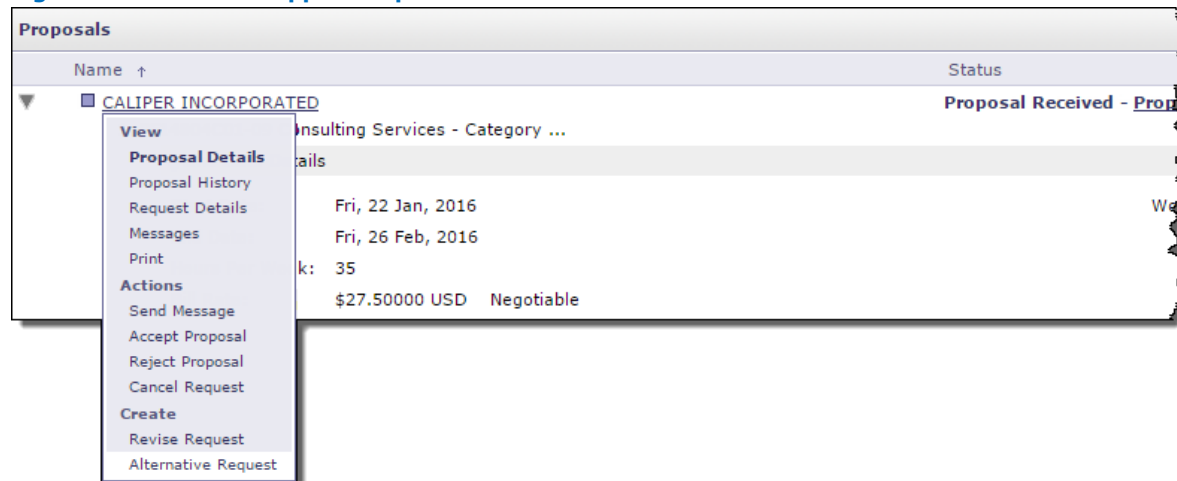
Table 13: Color Coded Status Indicators

Indicator	Status	Notes
 NURSEFINDERS 1. Registered Nurse II	Request Sent – Waiting For Response	"Response" in this status refers to a proposal. Messages from the supplier will not affect this status.
 NURSEFINDERS 1. Registered Nurse II	Request Sent – Waiting For Response	"Response" in this status refers to a proposal. Messages from the supplier will not affect this status.
 NURSEFINDERS 1. Registered Nurse II	Proposal Received – Proposal Details	Click the Proposal Details link to open the proposal for review.
 NURSEFINDERS 1. Registered Nurse II	Proposal Accepted and Request Closed	

SUPPLIER OPTIONS MENU

There is an **Options** menu for each invited supplier that lists what you can view and what actions you can take at any point in time, relative to the specific supplier. Click the supplier **Name** to open the **Options** menu. As shown in Figure 105, the menu groups options under three categories: items you can *View*, *Actions* you can take, and items you can *Create* from the existing request.

Figure 105: Invited Suppliers Options Menu



Items You Can View

View

Proposal Details

Proposal History

Request Details

Messages

Print

Actions

Send Message

Accept Proposal

Reject Proposal

Cancel Request

Create

Revise Request

Alternative Request

Proposal Details and Proposal History

If a proposal has been received from the supplier, you can view the proposal (*Proposal Details*) and the *Proposal History* by clicking the appropriate selection on the supplier **Options** menu. (See [Reviewing a Proposal](#) for more information.)

Request Details

If you select *Request Details*, the eMail will display a summary of the request sent to that supplier (**Figure 106**). Click the line item **Detail** button to see all information associated with that line item.

Figure 106: "Request Details" Summary Display

Back

More Options

Summary

History

Supplier: NURSEFINDERS

My Labels:

Line Items (1)

Hide Details

No.	Type	Description	Qty	Unit	Price	Amount
1		Registered Nurse II	1,232	hour	\$39.01268 USD	\$48,063.62176 USD

Supplier: NURSEFINDERS

Location: MIDLOTHIAN TURNPIKE, RICHMOND

Start Date: Tue, 1 Mar, 2016

End Date: Fri, 30 Sep, 2016

Commodity Code: Temporary personnel services (96269)

Contract Number: E194-737

Hours Per Week: 40

Work Location: DPS MAIL ROOM

Work Supervisor: Kemper, Gail

Bill To: P1942V-SP30 Billing Address

Small Business: ☐

Minority Owned Business: ☐

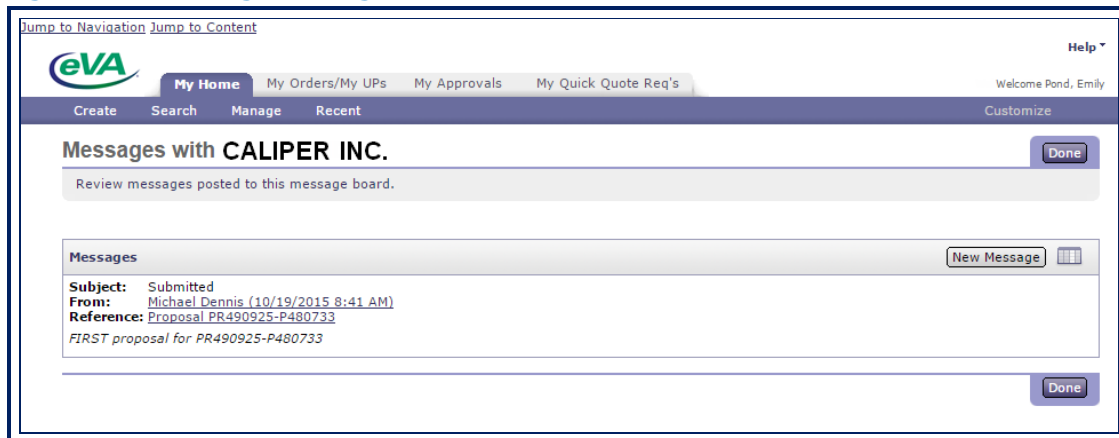
Registered Nurse II

Detail

Messages

To see messages from an invited supplier, open the options menu for that supplier and select *Messages*. All messages you have exchanged with the supplier will be displayed in descending order, with the most recent on top (**Figure 107**).

Figure 107: Viewing a Message Board



Print

If a proposal has been received, you can choose *Print* to see a printer-friendly summary of the supplier's proposal; otherwise, the request summary will be displayed. The proposal or summary will be displayed in a new browser window; press *Ctrl + p* to open a print window.

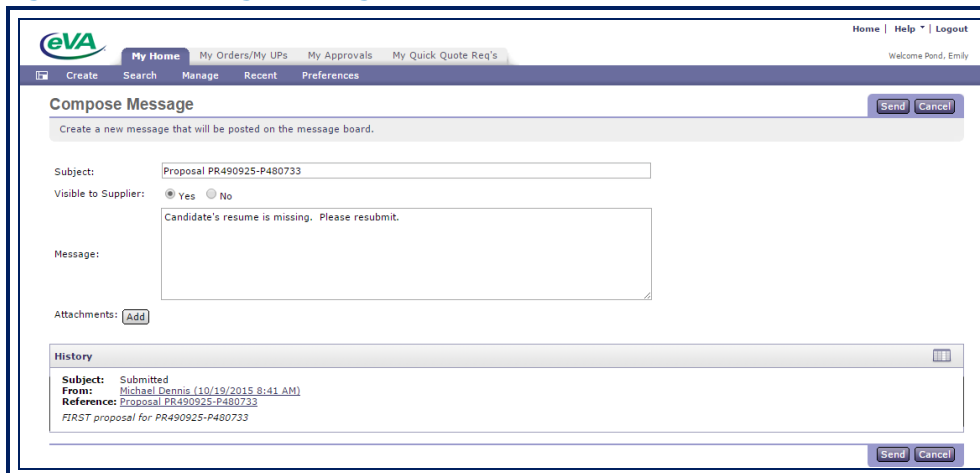
Actions You Can Take

View
Proposal Details
Proposal History
Request Details
Messages
Print
Actions
Send Message
Accept Proposal
Reject Proposal
Cancel Request
Create
Revise Request
Alternative Request

Send Message

To send a message to a specific supplier, open the options menu and select *Send Message*. A message form will open (Figure 108); enter your message and click **Send**.

Figure 108: Sending a Message



The screenshot shows the 'Compose Message' interface within the eVA system. At the top, there's a navigation bar with 'Home | Help * | Logout' and a welcome message 'Welcome Pond, Emily'. Below this is a menu bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main heading is 'Compose Message' with 'Send' and 'Cancel' buttons. A sub-header says 'Create a new message that will be posted on the message board.' The form contains the following fields:

- Subject:** Proposal PR490925-P480733
- Visible to Supplier:** Radio buttons for 'Yes' (selected) and 'No'.
- Message:** A text area containing the message: 'Candidate's resume is missing. Please resubmit.'
- Attachments:** An 'Add' button.
- History:** A section showing a previous submission with details:
 - Subject:** Submitted
 - From:** Michael Dennis (10/19/2015 8:41 AM)
 - Reference:** Proposal PR490925-P480733
 - Text:** FIRST proposal for PR490925-P480733

'Send' and 'Cancel' buttons are located at the bottom right of the form.

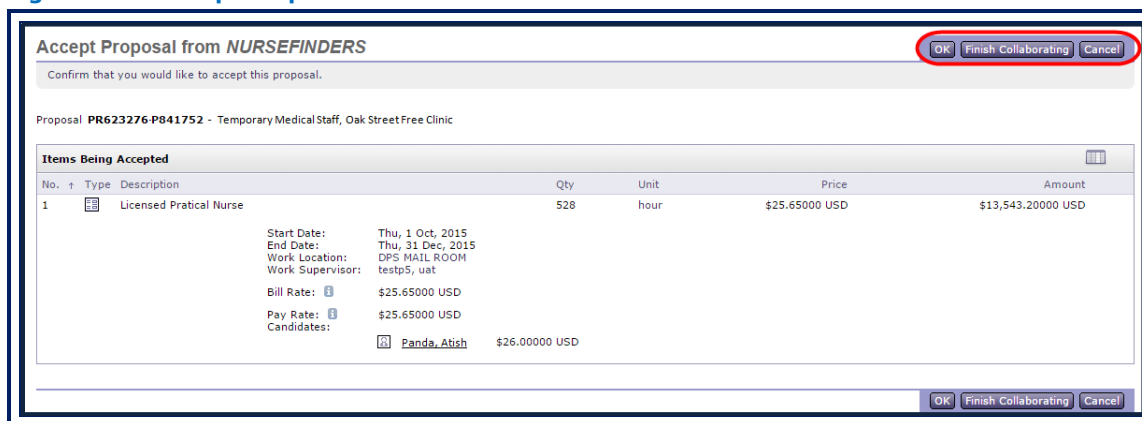
TEMPORARY LABOR REQUESTS

Accept or Reject a Proposal

To accept a proposal, select *Accept Proposal* to access the **ACCEPT PROPOSAL** screen. There, you can click **OK** to accept the proposal without ending collaboration, or click **Finish Collaborating** (Figure 109).

Be aware that you can also accept or reject individual candidates. This will be discussed in detail in the section [Accept/Reject a Candidate](#). This is mentioned here because it is important to remember that when you accept a proposal, *you are accepting the entire proposal*, even if you have previously rejected a line item candidate manually.

Figure 109: Accept Proposal Screen



Accept Proposal from NURSEFINDERS

Confirm that you would like to accept this proposal.

Proposal **PR623276-P841752** - Temporary Medical Staff, Oak Street Free Clinic

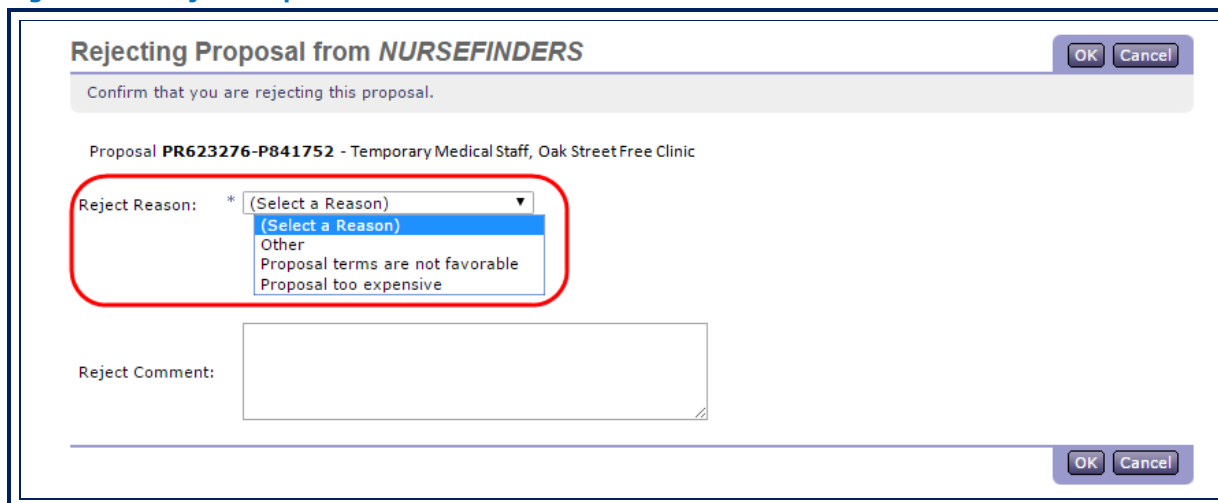
No.	Type	Description	Qty	Unit	Price	Amount
1		Licensed Pratical Nurse	528	hour	\$25.65000 USD	\$13,543.20000 USD

Start Date: Thu, 1 Oct, 2015
 End Date: Thu, 31 Dec, 2015
 Work Location: DPS MAIL ROOM
 Work Supervisor: testp5, uat
 Bill Rate: \$25.65000 USD
 Pay Rate: \$25.65000 USD
 Candidates: Panda, Abish \$26.00000 USD

OK Finish Collaborating Cancel

Select *Reject Proposal* to access the **REJECTING PROPOSAL** screen. Choose a **Reject Reason** from the drop-down list, add an optional **Reject Comment**, and click **OK** (Error! Reference source not found. Figure 110). The **Reject Reason** and any comments will be included in the notification to the supplier.

Figure 110: Reject Proposal Screen



Rejecting Proposal from NURSEFINDERS

Confirm that you are rejecting this proposal.

Proposal **PR623276-P841752** - Temporary Medical Staff, Oak Street Free Clinic

Reject Reason: * (Select a Reason)

(Select a Reason)
 Other
 Proposal terms are not favorable
 Proposal too expensive

Reject Comment:

OK Cancel

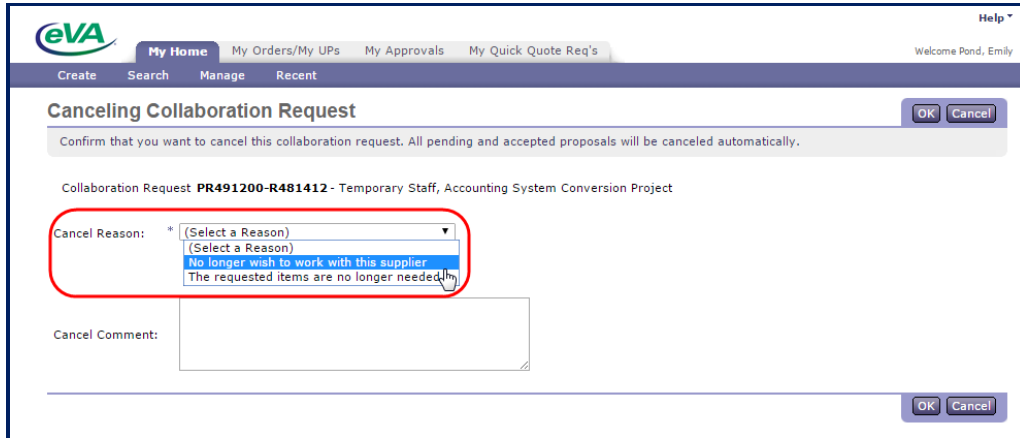
For more information concerning either of these options, see [Accept/Reject a Proposal](#).

Cancel Request

The final action item on the **Options** menu is *Cancel Request*. Select this option when you want to cancel the collaboration request *for that specific supplier only*. To fully cancel the entire request, see [Withdrawing a Collaboration Request](#).

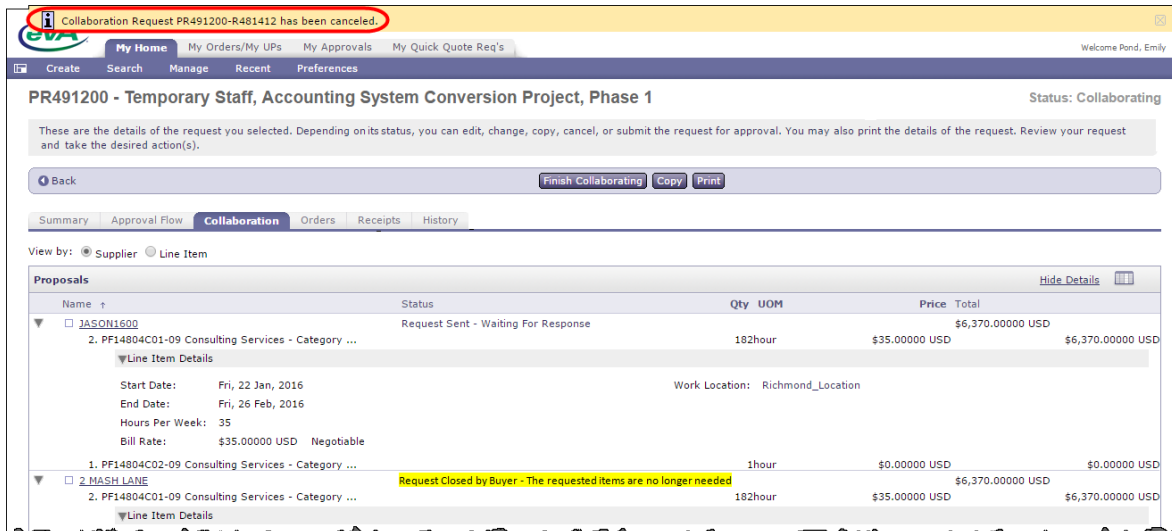
To cancel an individual request for collaboration, click the supplier name and then select *Cancel Request* on the **Options** menu to access the **CANCELING COLLABORATION REQUEST** screen (Figure 111).

Figure 111: Selecting a Reason for Cancelling a Collaboration Request



From the **Cancel Reason** drop-down list, choose the reason that best describes your situation. Add a **Cancel Comment** (optional) and click **OK** to return to the **COLLABORATION** tab. As shown in Figure 112, a cancellation message will be displayed at the top of the screen, and the status will reflect both the cancellation and the cancellation reason.

Figure 112: Collaboration Tab Showing Canceled Request

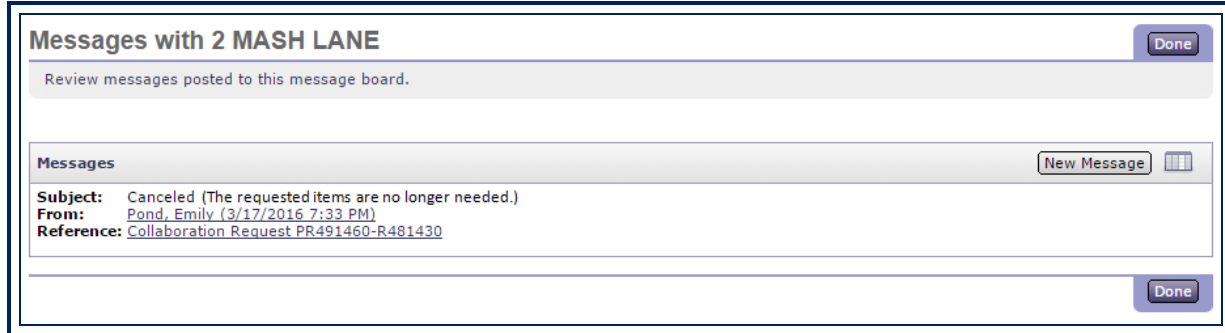


Name	Status	Qty	UOM	Price	Total
JASON1600	Request Sent - Waiting For Response	182	hour	\$35.00000 USD	\$6,370.00000 USD
2. PF14804C01-09 Consulting Services - Category ...					
Line Item Details					
Start Date:	Fri, 22 Jan, 2016	Work Location: Richmond_Location			
End Date:	Fri, 26 Feb, 2016				
Hours Per Week:	35				
Bill Rate:	\$35.00000 USD Negotiable				
1. PF14804C02-09 Consulting Services - Category ...		1	hour	\$0.00000 USD	\$0.00000 USD
2. MASH LANE	Request Closed by Buyer - The requested items are no longer needed	182	hour	\$35.00000 USD	\$6,370.00000 USD
2. PF14804C01-09 Consulting Services - Category ...					
Line Item Details					

TEMPORARY LABOR REQUESTS

When you cancel a request, the eMall will automatically send email notification to the supplier. The **Cancel Reason** you selected and the **Cancel Comment** (if any) will appear on the notification, as shown in **Figure 113**.

Figure 113: Message Board Displaying Record of Cancellation Message



The screenshot shows a web interface for a message board. At the top, it says "Messages with 2 MASH LANE" with a "Done" button. Below this is a section titled "Review messages posted to this message board." followed by a "Messages" section. The "Messages" section has a "New Message" button and a list of messages. The first message is a cancellation notice with the following details:

- Subject:** Canceled (The requested items are no longer needed.)
- From:** Pond, Emily (3/17/2016 7:33 PM)
- Reference:** Collaboration Request PR491460-R481430

At the bottom of the message list, there is another "Done" button.



IMPORTANT: This method only cancels the request for a single supplier. All other suppliers on the request are unaffected.

Items You Can Create

View

Proposal Details
Proposal History
Request Details
Messages
Print

Actions
Send Message
Accept Proposal
Reject Proposal
Cancel Request

Create
Revise Request
Alternative Request

Revise Request

The *Revise Request* option lets you create a counter-proposal by making alterations to the original request and sending the revised version to the selected supplier. You can create a different revised request for each collaborating supplier, if it serves your purpose to do so.



REMEMBER: A revised request replaces the original request.

When would you need to create a revised request? Suppose you have created a collaboration request with two (or more) line items. When you review the resulting proposals, you decide to use two different suppliers. Remember that accepting a proposal automatically accepts all line items; in this situation, you would create revised requests, so that each supplier will receive an updated request that contains only the line items that are applicable to that supplier.

To begin the process, open the **Options** menu for a supplier and select *Revise Request* to access the **CREATE COUNTER PROPOSAL** screen (Figure 114).

Figure 114: Create Counter Proposal – Review and Select Screen

Create Counter Proposal

PR623276-UR480071: Temporary Medical Staff, Oak Street Free Clinic
Items: 2 Total: \$66,732.48000 USD

Next Exit

Click **Include** or **Exclude** next to an item to include it or exclude it from the request. Excluded items may be included later in a revised request.

Based on: Collaboration Request PR623276-R842684 - Temporary Medical Staff, Oak Street Free Clinic

Include Or Exclude Items From Your Proposal						
Selection	No.	Description	Qty	Unit	Price	Amount
Included	1	Licensed Practical Nurse Start Date: Fri, 15 Apr, 2016 End Date: Sun, 30 Oct, 2016	1,128	hour	\$25.65000 USD	\$28,933.20000 USD
Included	2	Registered Nurse I Start Date: Fri, 15 Apr, 2016 End Date: Sun, 30 Oct, 2016	1,128	hour	\$33.51000 USD	\$37,799.28000 USD

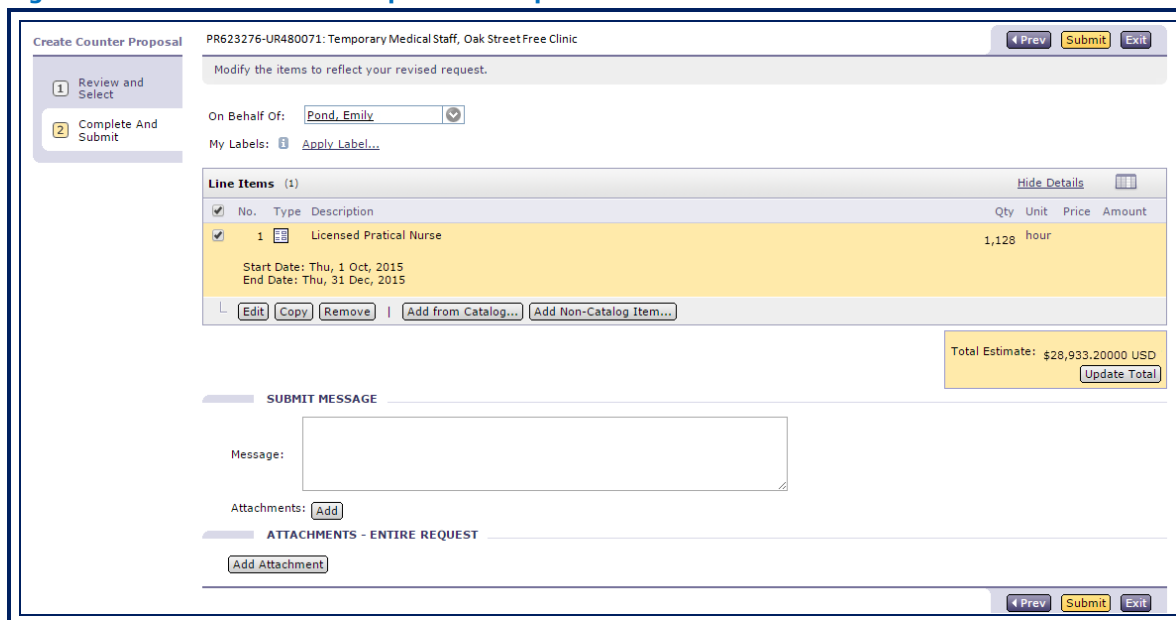
Selection
✓ Include Item
Exclude Item
Open
View Details
Edit

Next Exit

TEMPORARY LABOR REQUESTS

Review line items and decide whether to keep or exclude each one. If you select *Exclude Item*, the option to *Include Item* will become active, and you will be able to restore the excluded item if you change your mind. When you are finished, click **Next** to move to the **COMPLETE AND SUBMIT** screen, where you can add new line items, comments, and attachments (Figure 115).

Figure 115: Create Counter Proposal – Complete and Submit Screen



Create Counter Proposal PR623276-UR480071: Temporary Medical Staff, Oak Street Free Clinic

Modify the items to reflect your revised request.

On Behalf Of: Pond, Emily

My Labels: Apply Label...

No.	Type	Description	Qty	Unit	Price	Amount
1		Licensed Practical Nurse	1,128	hour		

Start Date: Thu, 1 Oct, 2015
End Date: Thu, 31 Dec, 2015

[Edit] [Copy] [Remove] | [Add from Catalog...] [Add Non-Catalog Item...]

Total Estimate: \$28,933.20000 USD [Update Total]

SUBMIT MESSAGE

Message:

Attachments: [Add]

ATTACHMENTS - ENTIRE REQUEST

[Add Attachment]

When you have completed your changes, click **Update Total** if necessary and then click **Submit**. The supplier will receive email notification of the revised request.

Alternative Request

An alternative request is very similar to a revised request; in fact, the creation process and screens are the same. The difference is that when an alternative request is created, the original request remains active. The supplier can choose to respond to either the original or the alternative request.

REVIEWING A PROPOSAL

When an invited supplier submits a proposal, the status on the **COLLABORATION** tab updates to *Proposal Received*, accompanied by a Proposal Details link (Figure 116). Click the link to open the proposal for review.

Figure 116: Collaboration Tab

PR623276 - Temporary Medical Staff, Oak Street Free Clinic
Status: Collaborating

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request.

Review your request and take the desired action(s).

Back
Finish Collaborating
Copy
Print

Summary
Approval Flow
Collaboration
Orders
Receipts
History

View by:
☒ Supplier
☐ Line Item

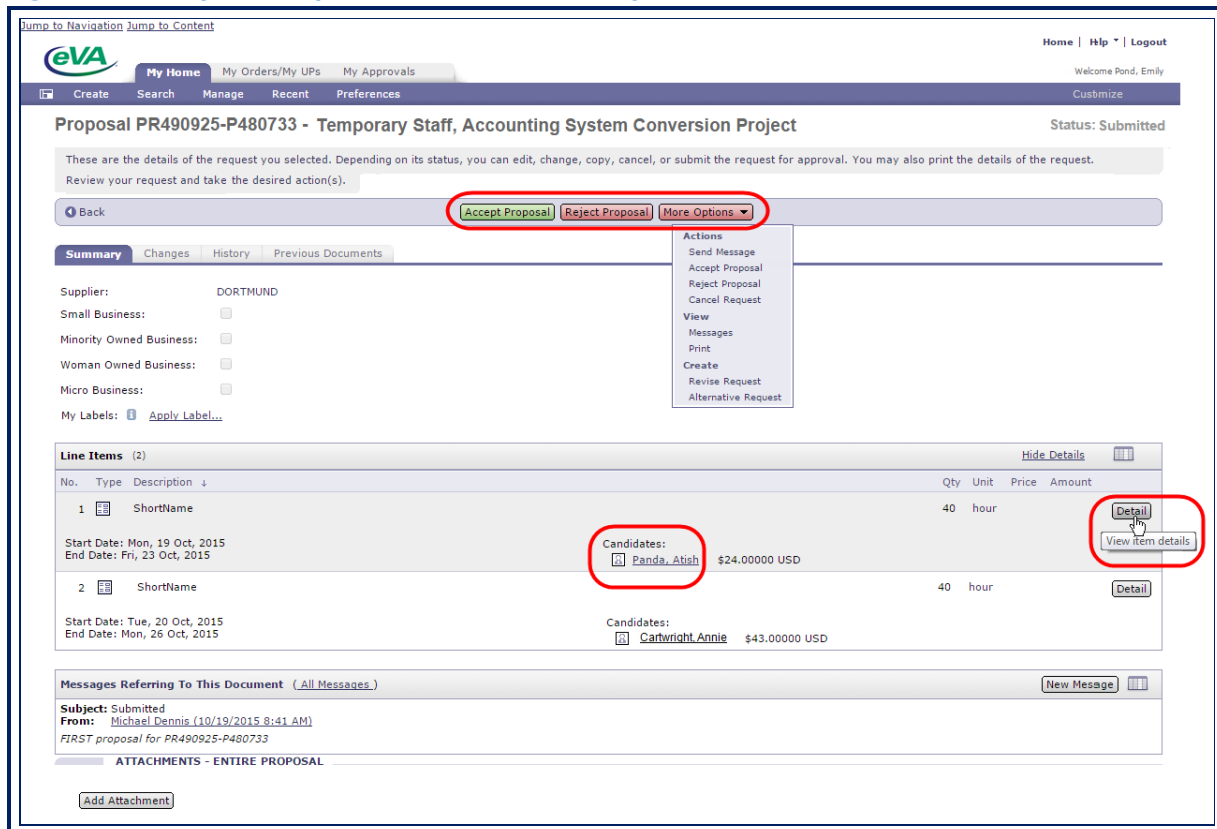
Proposals					Hide Details	
Name	Status	Qty	UOM	Price	Total	
<input type="checkbox"/> R.E.T. SOLUTIONS, INC.	Request Sent - Waiting For Response				\$9,465.60000 USD	
1. Licensed Practical Nurse		160	hour	\$25.65000 USD	\$4,104.00000 USD	
Line Item Details						
2. Registered Nurse I		160	hour	\$33.51000 USD	\$5,361.60000 USD	
Line Item Details						
<input type="checkbox"/> NATIONAL NURSES SERVICES, INC.	Request Sent - Waiting For Response				\$12,366.40000 USD	
1. Nurse Practitioner I		160	hour	\$43.78000 USD	\$7,004.80000 USD	
Line Item Details						
2. Registered Nurse I		160	hour	\$33.51000 USD	\$5,361.60000 USD	
Line Item Details						
<input checked="" type="checkbox"/> NURSEFINDERS	Proposal Received - Proposal Details				\$16,470.40000 USD	
1. Licensed Practical Nurse		160	hour	\$25.65000 USD	\$4,104.00000 USD	
Line Item Details						
2. Nurse Practitioner I		160	hour	\$43.78000 USD	\$7,004.80000 USD	
Line Item Details						
3. Registered Nurse I		160	hour	\$33.51000 USD	\$5,361.60000 USD	
Line Item Details						

TEMPORARY LABOR REQUESTS

The proposal will open to the **Summary** tab (Figure 117). Note the three action buttons near the top of the screen; one to accept the proposal, one to reject the proposal, and one that offers more options.

- To review line item details, click the corresponding **Detail** button.
- To see information about a candidate, click the candidate's name.

Figure 117: Proposal Response to Collaboration Request



Jump to Navigation [Jump to Content](#)

Home | [Help](#) | [Logout](#)

Welcome Pond, Emily

Customize

Proposal PR490925-P480733 - Temporary Staff, Accounting System Conversion Project Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request.

Review your request and take the desired action(s).

[Back](#) [Accept Proposal](#) [Reject Proposal](#) [More Options](#)

Summary Changes History Previous Documents

Supplier: DORTMUND

Small Business: ☐

Minority Owned Business: ☐

Woman Owned Business: ☐

Micro Business: ☐

My Labels: [Apply Label...](#)

Line Items (2) [Hide Details](#)

No.	Type	Description	Qty	Unit	Price	Amount
1		ShortName	40	hour		
Start Date: Mon, 19 Oct, 2015 End Date: Fri, 23 Oct, 2015						
Candidates:						
<input type="checkbox"/> Panda, Atish			\$24.00000 USD			
Detail						
View item details						
2		ShortName	40	hour		
Start Date: Tue, 20 Oct, 2015 End Date: Mon, 26 Oct, 2015						
Candidates:						
<input type="checkbox"/> Cartwright, Annie			\$43.00000 USD			
Detail						

Messages Referring To This Document ([All Messages](#)) [New Message](#)

Subject: Submitted

From: Michael Dennis (10/19/2015 8:41 AM)

FIRST proposal for PR490925-P480733

ATTACHMENTS - ENTIRE PROPOSAL

[Add Attachment](#)

Proposal Details: View Line Item Screen


Click the corresponding **Detail** button to review the proposal details for any line item, as shown in Figure 118.



NOTE: The Bill Rate amount that appears on the **Candidate** line will appear as the Unit Price on the requisition.

Figure 118: Proposal Details – View Line Item

Jump to Navigation
Jump to Content


My Home
My Orders/My UPs
My Approvals
New Dashboard Tab
More ...


Home | Help | Logout
Welcome Pond, Emily

Create
Search
Manage
Recent
Preferences
Customize

Proposal Details: View Line Item

PR490925-P480733: Temporary Staff, Accounting System Conversion Project OK

Review or edit the details of this line item.

Candidates								Show Details
Name	Start Date	End Date	Bill Rate	Qty	Fee Total	Expense	Total	
 Panda, Atish	Mon, 19 Oct, 2015	Fri, 23 Oct, 2015	\$24.00000 USD	40	\$960.00000 USD		\$960.00000 USD	

LINE ITEM 1: SHORTNAME

Zone:	098 - Central Virginia	Supplier:	DORTMUND
Years Experience:	4-6 years	Location:	WAREHOUSE
Start Date:	Mon, 19 Oct, 2015	Hours Per Week:	40
End Date:	Fri, 23 Oct, 2015	Work Location:	VITA - Eastern Office
Quantity:	40		4053 Legato Rd.
Unit of Measure:	hour		Fairfax, VA 22033
Pay Rate:	\$25.65000 USD	Bill To:	8 Main Street
			Ship Address
			Fairfax, VA 23121
		Work Supervisor:	Pond, Emily
		Candidate Required:	Yes
		Response Deadline:	Mon, 19 Oct, 2015
		Resume Required:	Yes
		Message:	
		Attachment(s):	(none)
		Contracts:	http://dps.dqs.virginia.gov/dps/contracts/covacontractsinfo.aspx

Market Price:	\$0.00000 USD
No.:	1
Description:	Systems Analyst
Supplier Part Number:	1
Supplier Auxiliary Part ID:	TempLabor_94864-01-09VP_eVACatalog_ST
Qty:	40
UOM:	hour
Price:	\$25.65000 USD
Receiving Method:	0
Location:	WAREHOUSE
Reg. Type:	Self-Registered
Contract #:	94864-01-09VP
Additional Data:	

COMMENTS - BY LINE ITEM

Add Comment

ATTACHMENTS - BY LINE ITEM

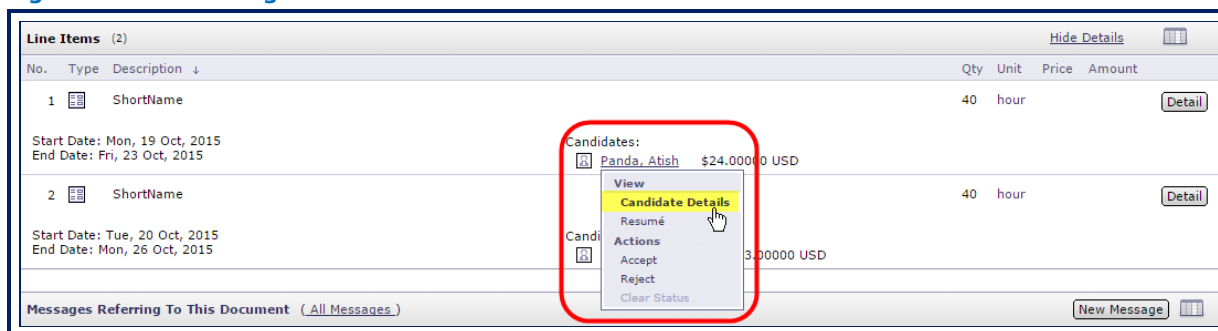
Add Attachment

OK

TEMPORARY LABOR REQUESTS

Candidate Details

On any screen that displays a candidate's name (the **Collaboration** tab, **PROPOSAL** screen, or **LINE ITEM DETAIL** screen), click the name to see a list of possible actions (Figure 119).

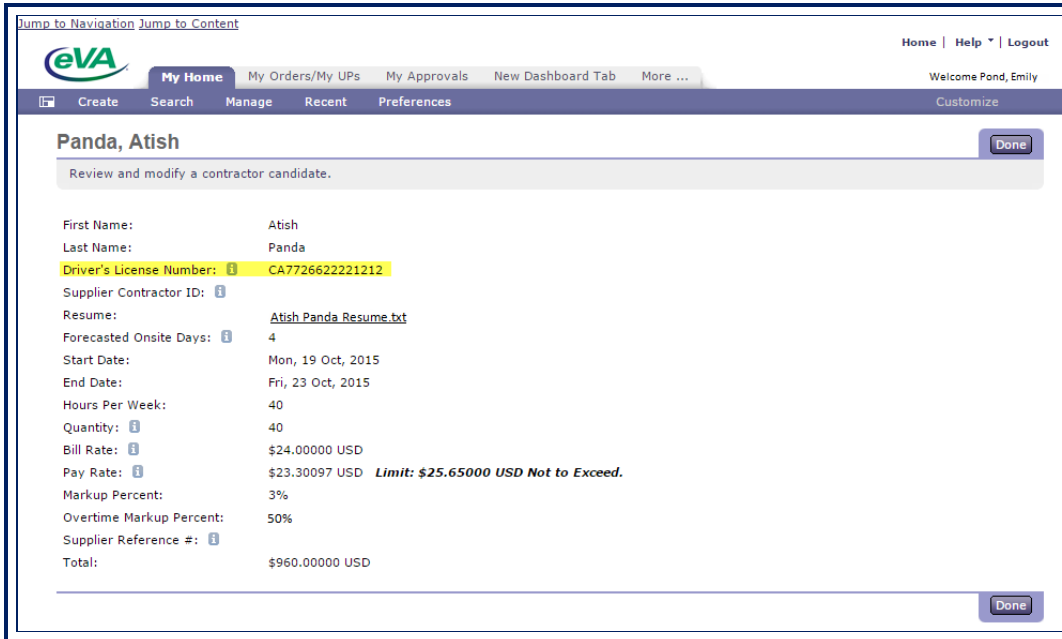
Figure 119: Accessing Candidate Details

Select *Candidate Details* to see that information in a new screen. As shown above in Figure 119, you can also choose to view (and download) the attached resume, as well as accept or reject the candidate.

The responding supplier will have entered cost information, displayed on the **CANDIDATE DETAILS** screen, including rates and markup percentages (Figure 120). Although the suppliers have some flexibility in determining pay rates and markup, they must abide by the limits set forth in the contract. If a supplier attempts to exceed those limits, eVA will return an error message, similar to the error message a buyer sees if limits are not observed on the request (Figure 100).

It is important, as the buyer, to understand the requirements of the contract. Pay special attention to any language concerning the vendor with the lowest markup percentage. When you finish reviewing this screen, click **Done** to return to the **PROPOSAL DETAILS** screen.

Figure 120: Candidate Details Screen



Jump to Navigation Jump to Content

Home | Help | Logout

Welcome Pond, Emily

My Home My Orders/My UPs My Approvals New Dashboard Tab More ...

Create Search Manage Recent Preferences Customize

Panda, Atish Done

Review and modify a contractor candidate.

First Name: Atish

Last Name: Panda

Driver's License Number: CA7726622221212

Supplier Contractor ID:

Resume: [Atish Panda Resume.txt](#)

Forecasted Onsite Days: 4

Start Date: Mon, 19 Oct, 2015

End Date: Fri, 23 Oct, 2015

Hours Per Week: 40

Quantity: 40

Bill Rate: \$24.00000 USD

Pay Rate: \$23.30097 USD *Limit: \$25.65000 USD Not to Exceed.*

Markup Percent: 3%

Overtime Markup Percent: 50%

Supplier Reference #:

Total: \$960.00000 USD

Done

The information on the **CANDIDATE DETAILS** screen, coupled with the experience and skills information in the attached resume, should be sufficient to determine the candidate's suitability for your project. If not, you can send a message to the supplier requesting more information.

When you review candidate details, confirm that the supplier has provided the contractor's driver's license number in the **CANDIDATE DETAILS** section (Figure 120). It is the driver's license number (NOT the Social Security number) that will be combined with the contractor's name and hiring agency to serve as the unique identifier within eVA. The unique identifier prevents confusion concerning contractors with the same or similar names.

TEMPORARY LABOR REQUESTS

The Proposal “Changes” Tab

The proposal **Changes** tab tracks changes made to the original request. These changes might have been made by the responding supplier or by the system, as shown in **Figure 121**; but changes made by the preparer, such as accepting a candidate, will also be recorded here.

Figure 121: Proposal Changes Tab

Summary Changes History Previous Documents	
Changes from PR490925-R481202: Temporary Staff, Accounting System Conversion Project	
Field ↑	Action
▼ Line Item 1	
▼ Bill Rate	
Qualifier	changed from Not to Exceed to having no value
Candidates 1	changed from (no value) to Panda, Atish
▼ Pay Rate	
Qualifier	changed from Not to Exceed to having no value
▼ Line Item 2	
▼ Bill Rate	
Qualifier	changed from Not to Exceed to having no value
Candidates 1	changed from (no value) to Cartwright, Annie
▼ Pay Rate	
Qualifier	changed from Not to Exceed to having no value

In the example above, you can see that the supplier added the names of the candidates. The *Not to Exceed* qualifier has been removed from the **Bill Rate** and **Pay Rate** fields by the system, because the proposal constitutes a firm offer, and the contractor cannot exceed the terms of the contract.

The Proposal History Tab

The proposal **History Tab** tracks and displays actions that affect the status of the proposal. Both vendor and buyer actions are recorded here (**Figure 122**).

Figure 122: Proposal History Tab

Jump to Navigation

Jump to Content

eVA

My Home

My Orders/My UPs

My Approvals

Create

Search

Manage

Recent

Preferences

Home

Help

Logout

Welcome Pond, Emily

Customize

Proposal PR490867-P480723 - jason test

Status: Accepted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

Back

More Options

Summary

Changes

History

Previous Documents

Date	User	Real User	Action	Summary
Wed, 07 Oct, 2015, 3:22 PM	Pond, Emily	Pond, Emily	Accepted	PR490867-P480723 accepted.
Wed, 07 Oct, 2015, 3:08 PM	Michael Dennis	Michael Dennis	Submitted	PR490867-P480723 submitted for approval.
Wed, 07 Oct, 2015, 3:08 PM	Michael Dennis		Approval not required	PR490867-P480723 required no approval.
Wed, 07 Oct, 2015, 3:08 PM	Michael Dennis	Michael Dennis	Responded	PR490867-P480723 proposed in response to PR490867-R481184.

The Proposal Previous Documents Tab

This tab maintains a list of previous documents associated with the proposal, including the collaboration request that prompted the proposal and other proposals responding to the same request (Figure 123). Click the name of a document to open it.

Figure 123: View and Download Previous Documents



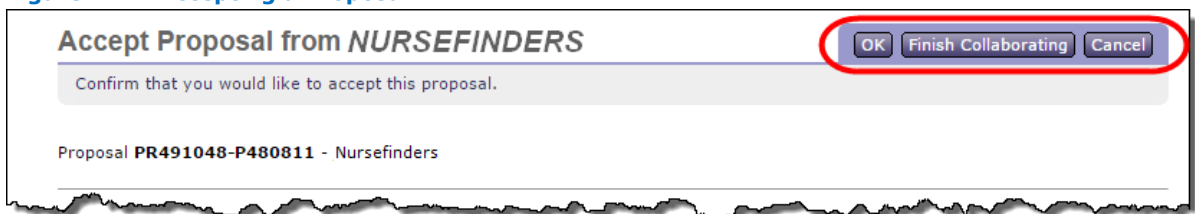
Name	Date Submitted	Status	Qty	UOM	Price	Total
Proposal PR490867-P480724 1. Administrative Assistant I [a] asdf, 1	Wed, 7 Oct, 2015	Obsolete	56	hour	\$1.00000 USD	\$56.00000 USD
Collaboration Request PR490867-R481184 1. Administrative Assistant I	Wed, 7 Oct, 2015	Submitted	56	hour	\$13.29000 USD	\$744.24000 USD
Request PR490867-UR480054 1. Administrative Assistant I [a] asdf, 1	Wed, 7 Oct, 2015	Obsolete	56	hour	\$1.00000 USD	\$56.00000 USD
Request PR490867-UR480055 1. Administrative Assistant I [a] asdf, 1	Wed, 7 Oct, 2015	Submitted	56	hour	\$1.00000 USD	\$56.00000 USD

COMPLETING THE COLLABORATION

To complete the collaboration process, you will decide which proposal (if any) to accept, and then take the appropriate action. If you are accepting a proposal that contains multiple candidates for a single line item, you must also specify which candidate you want to engage. Be sure to evaluate each candidate's information as provided by the supplier.

To accept a proposal, open the **Supplier Options** menu for the chosen supplier and select *Accept Proposal*. The **ACCEPT PROPOSAL** screen will open and you will be able to click **OK** to accept the proposal without ending collaboration, or choose to end collaboration (Figure 124).

Figure 124: Accepting a Proposal



Collaboration ends when you click the **Finish Collaborating** button, which can take place concurrent with accepting a proposal or sometime thereafter. All suppliers are notified of your decision to accept or reject their proposals after collaboration ends, with one exception. If you use the **Supplier Options** menu to reject a specific proposal, the supplier is notified immediately. The primary reason for rejecting a proposal is to provide the supplier an opportunity to submit a revised proposal that better meets the buyer's needs. For this reason, it is rarely necessary to reject a proposal.



IMPORTANT: Clicking **OK** on the **ACCEPT PROPOSAL** screen will **NOT** trigger supplier notifications.

ACCEPT/REJECT A CANDIDATE

On the **PROPOSAL DETAILS** screen, click the candidate name to open the drop-down menu, as shown in **Figure 119**, but this time, select *Accept* or *Reject*. Any time the proposal you want to accept offers more than one candidate for a given line item, you must indicate which candidate is being accepted.

When you accept or reject a candidate, the supplier is notified, regardless of whether you have ended collaboration.

ACCEPT/REJECT A PROPOSAL

If you have determined that a proposal meets your needs in terms of candidate, dates, and rate, go to the **PROPOSAL DETAILS** screen and click the green **Accept Proposal** button.

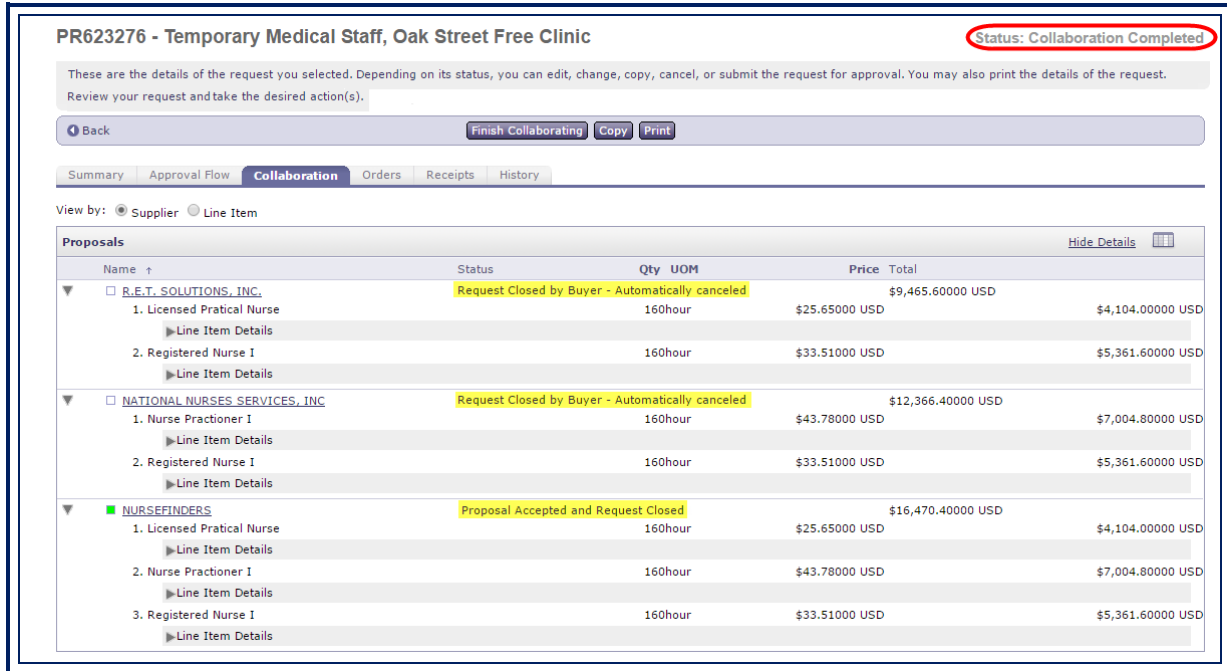
If, on the other hand, you have determined that you have not received a proposal that meets your needs, and you want to give one or more of the invited suppliers a chance to try again, click **Reject Proposal**. The supplier(s) will be notified, and, provided you have not ended the collaboration, can submit an amended proposal with different rates, a new candidate, etc.

FINISHING COLLABORATION

When you have accepted a proposal and are ready to end collaboration, return to the **Collaboration** tab and click **Finish Collaborating**. The status will be updated to *Collaboration Completed*, and the information from the accepted proposal will be merged into the requisition, which will then be routed for final approvals. When all required approvals have been obtained, a purchase order will be generated and sent to the selected supplier, and the request will go to *Ordered* status.

Note that accepting a proposal and ending collaboration will automatically cancel outstanding proposals and notify suppliers who are set up for notifications, as shown in Figure 125.

Figure 125: Closed Request Showing Automatically Canceled Status



PR623276 - Temporary Medical Staff, Oak Street Free Clinic Status: Collaboration Completed

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

[Back](#) [Finish Collaborating](#) [Copy](#) [Print](#)

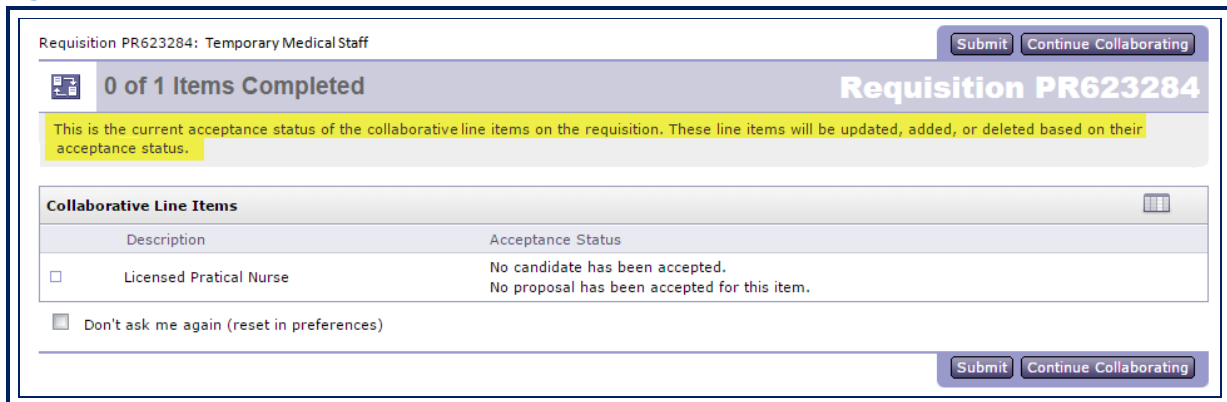
[Summary](#) [Approval Flow](#) [Collaboration](#) [Orders](#) [Receipts](#) [History](#)

View by: ☒ Supplier ☐ Line Item

Name	Status	Qty	UOM	Price	Total
R.E.T. SOLUTIONS, INC.	Request Closed by Buyer - Automatically canceled				\$9,465.60000 USD
1. Licensed Practical Nurse		160hour		\$25.65000 USD	\$4,104.00000 USD
2. Registered Nurse I		160hour		\$33.51000 USD	\$5,361.60000 USD
NATIONAL NURSES SERVICES, INC.	Request Closed by Buyer - Automatically canceled				\$12,366.40000 USD
1. Nurse Practitioner I		160hour		\$43.78000 USD	\$7,004.80000 USD
2. Registered Nurse I		160hour		\$33.51000 USD	\$5,361.60000 USD
NURSEFINDERS	Proposal Accepted and Request Closed				\$16,470.40000 USD
1. Licensed Practical Nurse		160hour		\$25.65000 USD	\$4,104.00000 USD
2. Nurse Practitioner I		160hour		\$43.78000 USD	\$7,004.80000 USD
3. Registered Nurse I		160hour		\$33.51000 USD	\$5,361.60000 USD

If you try to end collaboration without accepting any proposal or candidate for a given line item, a **COLLABORATION STATUS** message will be displayed (Figure 126).

Figure 126: Collaboration Status Screen



Requisition PR623284: Temporary Medical Staff [Submit](#) [Continue Collaborating](#)

0 of 1 Items Completed **Requisition PR623284**

This is the current acceptance status of the collaborative line items on the requisition. These line items will be updated, added, or deleted based on their acceptance status.

Description	Acceptance Status
<input type="checkbox"/> Licensed Practical Nurse	No candidate has been accepted. No proposal has been accepted for this item.

☐ Don't ask me again (reset in preferences)

[Submit](#) [Continue Collaborating](#)

If you then choose to end collaboration, any line items for which you have not accepted a proposal or candidate will be deleted from the request, and the request will return to *Submitted* status.

TEMPORARY LABOR REQUESTS

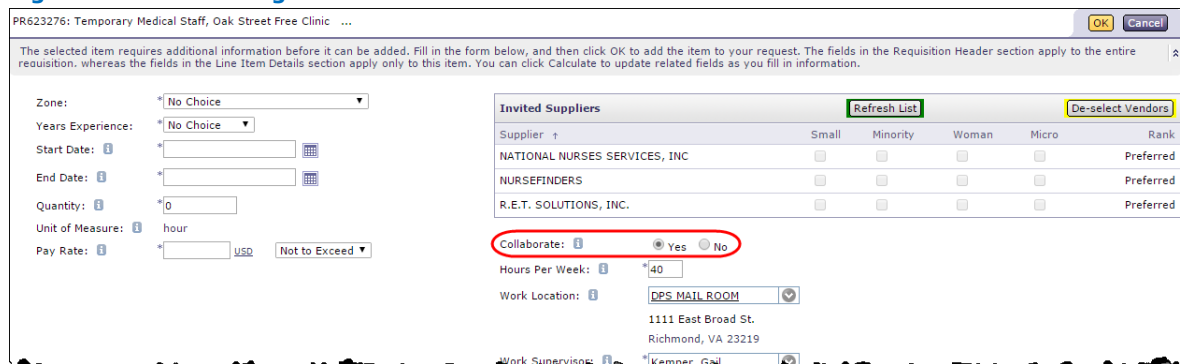
After you have selected a candidate and finished collaboration, Global Security will set up the candidate as a contractor in eVA. This will allow the contractor to create and submit timesheets in the eMail. Timesheets act as receipts for contract labor purchase orders. For information regarding timesheets, from creation to approval, see *eMail User Guide Volume 2, Chapter 6, Receipts and Timesheets*.

EDITING ITEMS AFTER COLLABORATION IS COMPLETE

You can edit line items after collaboration is complete. A warning will pop up when you click the **Edit** button. Close the warning message and proceed with your edits.

It is important to remember that if you edit a request, collaboration is not relaunched automatically. The collaboration icons no longer appear in the approval workflow. If you are making changes that impact the supplier, such as selecting a different candidate, you will need to restart collaboration. To do this, choose **Collaboration** on the **EDIT** screen as shown in **Figure 127**, and work your way through the collaboration screens, making changes as needed, until you resubmit the request.

Figure 127: Restarting Collaboration



The selected item requires additional information before it can be added. Fill in the form below, and then click OK to add the item to your request. The fields in the Requisition Header section apply to the entire requisition, whereas the fields in the Line Item Details section apply only to this item. You can click Calculate to update related fields as you fill in information.

Zone:

Years Experience:

Start Date:

End Date:

Quantity:

Unit of Measure:

Pay Rate:

Invited Suppliers

Supplier	Small	Minority	Woman	Micro	Rank
NATIONAL NURSES SERVICES, INC.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
NURSEFINDERS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
R.E.T. SOLUTIONS, INC.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred

Collaborate: ☒ Yes ☐ No

Hours Per Week:

Work Location:

1111 East Broad St.
Richmond, VA 23219

Work Supervisor:

You can also restart collaboration by adding a new collaborative item to the requisition, or you can copy and paste the original collaborative item, delete the original, and then resubmit the requisition.

If you copy the original item, be aware that the copied item will not contain the supplier, candidate, or collaboration history from the original item; when you restart collaboration, you are effectively starting over. Also, the rate qualifier for the copied item will be taken from the contract policy, if specified; if not, it will default to *Not to Exceed*.

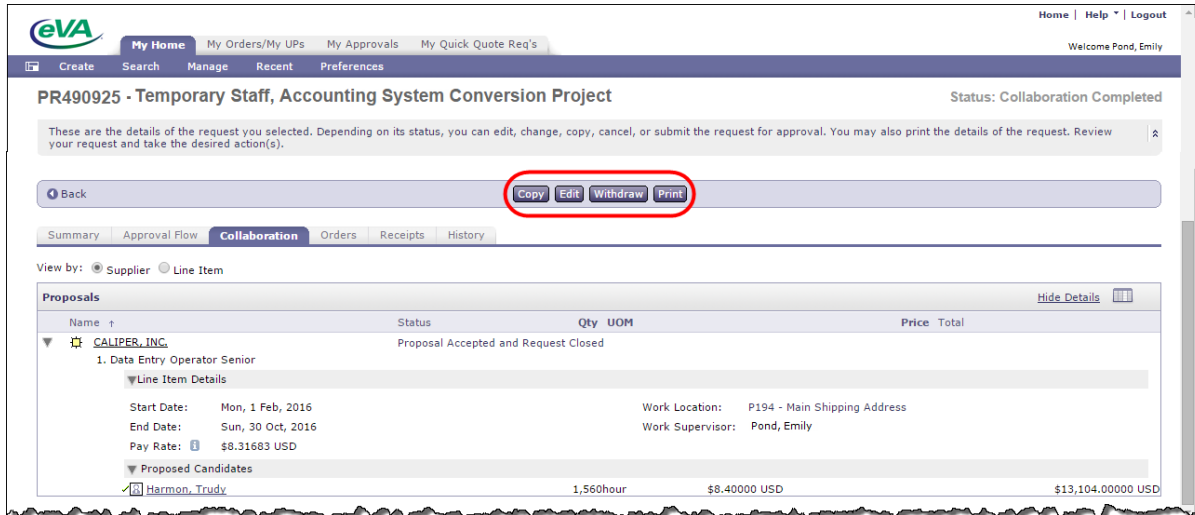
CONTRACTOR ONBOARDING

When the contractor arrives on site and is set up with a valid email, notify Global Security. The contractor will receive an email containing their User ID and temporary password. You will also want to provide the contractor a copy of the *Time Sheets Quick Guide for Contractors*, which can be found in the Report and Resource Center in the Buyer Portal.

WITHDRAWING A COLLABORATION REQUEST

You cannot withdraw a request during collaboration, but when collaboration has been completed, a **Withdraw** button will be available on the request as shown in Figure 128.

Figure 128: Withdrawing a Collaboration Request



The screenshot shows the eVA interface for a request titled "PR490925 - Temporary Staff, Accounting System Conversion Project". The status is "Collaboration Completed". A toolbar contains buttons for "Copy", "Edit", "Withdraw", and "Print", with "Withdraw" highlighted by a red circle. Below the toolbar, the "Collaboration" tab is selected, showing details for "CALIPER, INC." and a table of proposals.

Name	Status	Qty	UOM	Price	Total
1. Data Entry Operator Senior	Proposal Accepted and Request Closed				
Proposed Candidates					
Harmon, Trudy		1,560	hour	\$8.40000 USD	\$13,104.00000 USD



IMPORTANT: When a request is withdrawn during the post-collaboration approval phase, the supplier is **not** notified automatically.

If you withdraw a request during post-collaboration approval, you must notify the vendor that the proposal is no longer accepted. Go to the **Collaboration** tab and click the vendor name. Select **Send Message** on the **Supplier Options** menu, complete the email form, and click **Send**.

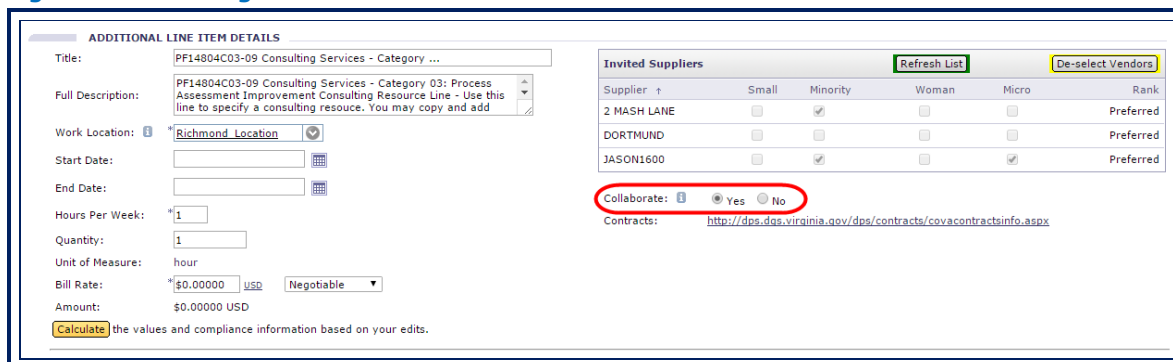
CREATING A NON-COLLABORATION REQUEST FOR TEMPORARY LABOR

It might happen that you need temporary labor, but you already have someone in mind. This usually occurs when you want to hire a temporary staffer who was hired by your agency in the past. In that case, the contractor will already be set up in eVA and will only require reactivation to be able to create timesheets.

TEMPORARY LABOR REQUESTS

Begin by creating a requisition just as you would for a collaboration request: enter the necessary information on the **REQUISITION TITLE** screen, and then find the appropriate catalog job item, add it your shopping cart, and proceed to the **CATEGORY DETAILS** screen. Find the **Collaboration** option and change it from Yes to No (Figure 129).

Figure 129: Turning Off Collaboration



ADDITIONAL LINE ITEM DETAILS

Title: PF14804C03-09 Consulting Services - Category ...

Full Description: PF14804C03-09 Consulting Services - Category 03: Process Assessment Improvement Consulting Resource Line - Use this line to specify a consulting resource. You may copy and add

Work Location:

Start Date:

End Date:

Hours Per Week:

Quantity:

Unit of Measure: hour

Bill Rate: Negotiable

Amount: \$0.00000 USD

Calculate the values and compliance information based on your edits.

Invited Suppliers

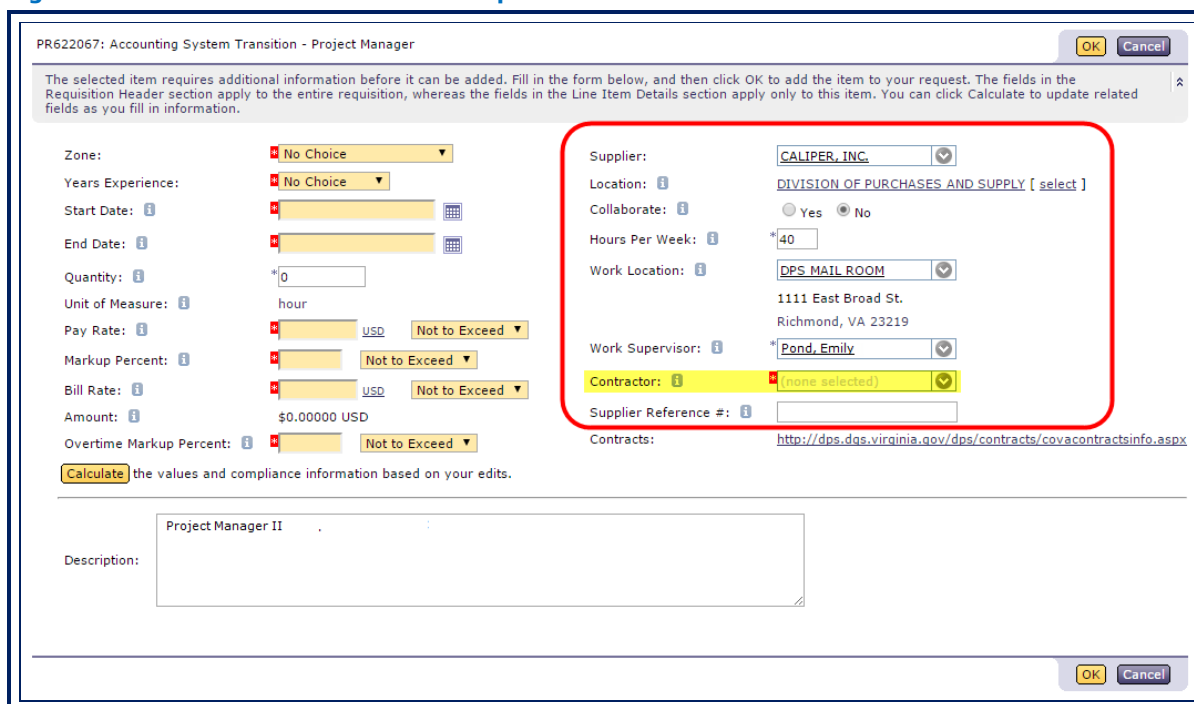
Supplier	Small	Minority	Woman	Micro	Rank
2 MASH LANE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
DORTMUND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preferred
JASON1600	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preferred

Collaborate: ☒ Yes ☐ No

Contracts: <http://dps.dqs.virginia.gov/dps/contracts/covacontractsinfo.aspx>

The screen will automatically refresh, replacing the **Invited Suppliers** list with vendor and contractor information fields as shown in Figure 130.

Figure 130: Non-Collaborative Labor Request – Line Item Details



PR622067: Accounting System Transition - Project Manager

The selected item requires additional information before it can be added. Fill in the form below, and then click OK to add the item to your request. The fields in the Requisition Header section apply to the entire requisition, whereas the fields in the Line Item Details section apply only to this item. You can click Calculate to update related fields as you fill in information.

Zone:

Years Experience:

Start Date:

End Date:

Quantity:

Unit of Measure: hour

Pay Rate: USD

Markup Percent:

Bill Rate: USD

Amount: \$0.00000 USD

Overtime Markup Percent:

Calculate the values and compliance information based on your edits.

Supplier:

Location:

Collaborate: ☒ Yes ☐ No

Hours Per Week:

Work Location:

1111 East Broad St.
Richmond, VA 23219

Work Supervisor:

Contractor:

Supplier Reference #:

Contracts: <http://dps.dqs.virginia.gov/dps/contracts/covacontractsinfo.aspx>

Project Manager II

Description:

You must complete all fields marked with an asterisk (*), as they are required. To do so correctly, it is important to understand the contract terms for the selected vendor relative to **Markup** and **Overtime Markup**.

Use the drop-down list to select the contractor. If the contractor you plan to use is not on the list, use the *Search for more ...* option. When you select a contractor name, eVA will automatically supply the contractor's driver's license number, which, when combined with the contractor's name and the hiring agency, serves as a unique identifier in eVA (Figure 131).

Figure 131: eVA Supplies the Contractor's Driver's License Number

Work Supervisor: ⓘ	* Pond, Emily ▼
Contractor: ⓘ	Cartwright, Annie ▼
Contractor Driver's License Number: ⓘ	VA2544264
Supplier Reference #: ⓘ	
Contracts:	http://dps.dqs.virginia.gov/dps/contracts/covacontractsinfo.aspx

Table 14 below provides information about the fields that appear on the **NON-COLLABORATIVE REQUEST LINE ITEM DETAILS** screen.

Table 14: Non-Collaborative Labor Request Line Item Details Fields

Field	Required?	Description
Zone	Y	Use this drop-down list to select the zone in which the work will be performed.
Years Experience	Y	Use this drop-down list to indicate how much experience the candidate has.
Start Date	Y	Use the calendar icon to select the contractor's start date, or type it into the text box.
End Date	Y	Use the calendar icon to select the contractor's end date, or type it into the text box.
Quantity	Y	The Quantity represents the total number of hours needed to complete the work. eVA will calculate this number, using the Start and End Dates and the number of Hours Per Week . If the calculation does not occur automatically, click the Calculate button.
Unit of Measure	N/A	This read-only field is set in accordance with the default indicated in the contract.
Pay Rate	Y	The Pay Rate is the vendor's internal rate that will be paid to the contractor; it comprises two fields. The first field shows the rate per unit of measure, expressed in U.S. dollars. The second field, the qualifier, defaults to <i>Not to Exceed</i> .
Markup Percent	Y	The Markup Percent is a percentage of the Pay Rate that is added to cover the supplier's expenses and profit. The Markup Percent is expressed as a percentage plus a qualifier. The maximum allowable markup can be found in the contract details. NOTE: Remember to check the contract for language regarding selection of the vendor with the lowest percentage markup.

TEMPORARY LABOR REQUESTS

Field	Required?	Description
Bill Rate	Y	The Bill Rate is the amount per Unit of Measure the supplier will charge your agency for the contractor's services. The Bill Rate is also expressed as a dollar amount plus a qualifier. It is calculated by adding the Markup Percent to the Pay Rate . After you enter the Pay Rate and the Markup Percent , click Calculate for eVA to calculate and display the Bill Rate and the Amount .
Amount	N/A	This read-only field represents the total cost of the contractor's services for the entire engagement, excluding any overtime. eVA calculates the Amount by multiplying the Bill Rate by the Quantity .
Overtime Markup Percent	Y	The Overtime Markup Percent is the percentage of the Pay Rate that is added when overtime is reached. For example, the standard overtime pay of "time and a half" is reached by adding an overtime markup of 50 percent to the base Pay Rate . Like the Markup Percent , the Overtime Markup Percent is expressed as a percentage plus a qualifier. Refer to the contract details for the applicable figure. NOTE: Remember to check the contract for language regarding selection of the vendor with the lowest percentage markup..
Supplier	N	The Supplier field will be pre-populated based on your shopping cart item. Use the drop-down list or the <i>Search for more ...</i> option to change the value displayed, if necessary. This field is not designated as required because it is pre-populated. You can replace the original value with another; however, you cannot proceed if the Supplier field blank.
Location	N	This is the supplier's location. The field will be prepopulated based on the supplier; like the Supplier field, the Location field must contain a value in order to proceed with the request. If the supplier has more than one location registered with eVA, you will also be required to select a contact.
Collaborate	N/A	This set of option buttons controls whether or not Collaboration is enabled for the current request.
Hours per Week	Y	Enter the number of hours the contractor is expected to work per week. This number is used with the Start and End Dates to calculate the Quantity .
Work Location	N	Use the drop-down list to select the location where most or all of the work will be performed.
Work Supervisor	Y	The Work Supervisor is the person to whom the contractor will report, and who will approve the contractor's time sheets. The Work Supervisor might also be called the Hiring Manager.
Contractor	Y	Use the drop-down list or the Search for more ... option to find the name of the candidate you have chosen. When you select the contractor name, eVA will also supply the contractor's driver's license number.
Supplier Reference #	N	You can enter a reference number provided by the supplier, or you can use this field to communicate additional vendor-specific information.
Contracts	N/A	One or more links to the applicable contract or contracts.

When you have entered all of the necessary information, click **OK** to proceed. From this point, continue as you would for any standard requisition. When the request goes to *Ordered* status, a system-generated email will notify the Security Officer that an existing contractor needs to be reactivated. Upon reactivation, the contractor will receive an email containing the previously established **User ID** and a temporary password.



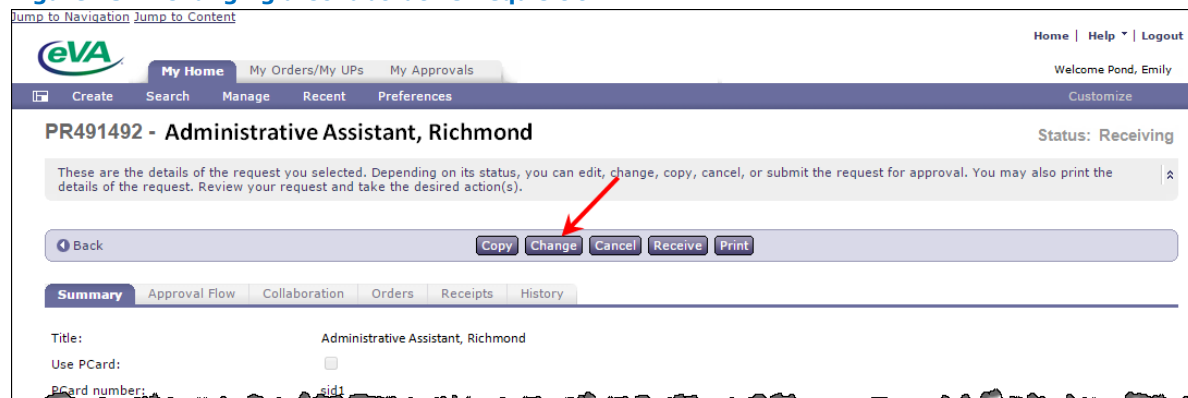
NOTE: *You can have a collaboration and non-collaboration item on the same request, but the non-collaboration item will not be active until the request is submitted to Ordered status.*

SPLITTING A TEMPORARY LABOR REQUEST

There might be times when you have to make an adjustment to a temporary labor request due to an administrative function. Suppose you have hired a consultant for a project lasting several weeks. The consultant is submitting time sheets against the request you created during the hiring process. What should you do if, halfway through the project, the contract changes, and the supplier's markup rate is affected?

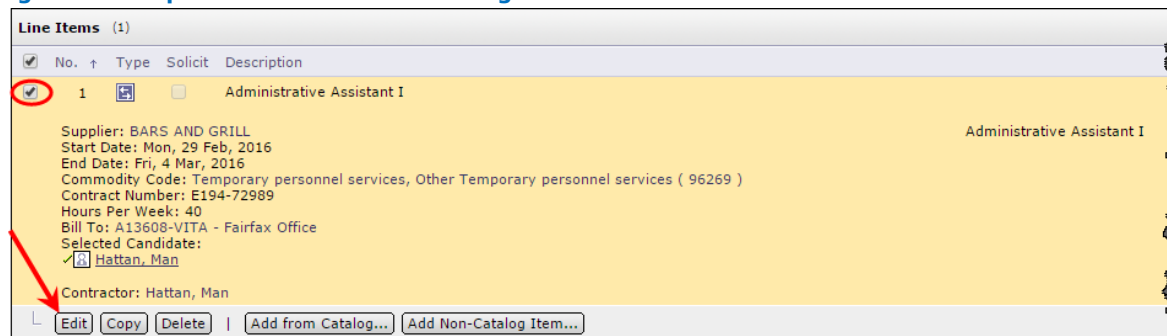
The answer is to split the requisition into two requests, one that ends on the last day of the old markup rate and another that begins on the first day of the new markup rate. Begin by opening the requisition to the **Summary** tab and clicking **Change** (Figure 132).

Figure 132: Changing a Collaborative Requisition



Go to the **Line Items** section. Make sure the **Line Item** box is checked, and then click **Edit** under the affected line item (Figure 133).

Figure 133: Open the Line Item for Editing



When the line item opens, change the **End Date** to the last date the old rates were in effect (**Figure 134**) and confirm that the **Re-collaborate** option is set to **No**, as shown below. Click **OK** to return to the **Summary** tab.

Figure 134: Changing the End Date on a Line Item

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM 1: ADMINISTRATIVE ASSISTANT I

Zone: 06 - Northern Virginia

Years Experience: 7-9 years

Start Date: Mon, 1 Feb, 2016

End Date: Fri, 4 Mar, 2016

Quantity: 200

Unit of Measure: hour

Pay Rate: \$10.47619C USD Not

Supplier: BARS AND GRILL

Location: RESTAURANT [select]

Collaborate: Yes

Re-collaborate: Yes No

Hours Per Week: 40

Work Location: VITA - Eastern Office

4053 Legato Rd.
Fairfax, VA 22033

Work Supervisor: McDowell, Doug

Selected Candidate: Hattan, Man

Next, click to select the **Line Item** box again, as shown above in **Figure 133**, but this time click **Copy** to create a second line item that is identical to the original (**Figure 135**).

Figure 135: Copying a Line Item

No.	Type	Solicit	Description	Qty	Unit	Price	Amount
1			Administrative Assistant I	120	hour	\$11.00000 USD	\$1,320.00000 USD
2			Administrative Assistant I	120	hour	\$11.00000 USD	\$1,320.00000 USD

Supplier: BARS AND GRILL
Start Date: Mon, 1 Feb, 2016
End Date: Fri, 19 Feb, 2016
Commodity Code: Temporary personnel services, Other Temporary personnel services (96269)
Contract Number: E194-72989
Hours Per Week: 40
Bill To: A13608-VITA - Fairfax Office
Selected Candidate: Hattan, Man
Contractor: Hattan, Man

Invited Suppliers: BARS AND GRILL
Start Date: Mon, 1 Feb, 2016
End Date: Fri, 19 Feb, 2016
Commodity Code: Temporary personnel services, Other Temporary personnel services (96269)
Contract Number: E194-72989
Hours Per Week: 40
Bill To: A13608-VITA - Fairfax Office
Contractor: Hattan, Man

[Edit] [Copy] [Delete] [Add from Catalog...] [Add Non-Catalog Item...]

Open the new line item for editing, just as you did with the first line item. Turn off Collaboration by changing the **Collaborate** option from **Yes** to **No** (**Figure 136**).

Figure 136: Turning Off Collaboration

PR491492-V2: Data for cspl-7285

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM 2: ADMINISTRATIVE ASSISTANT I

Zone: 06 - Northern Virginia

Years Experience: 7-9 years

Start Date: Mon, 1 Feb, 2016

End Date: Fri, 19 Feb, 2016

Quantity: 120

Unit of Measure: hour

Pay Rate: \$12.00000 USD Not to Exceed

Invited Suppliers

Supplier	Small	Minority	Woman	Micro	Rank
BARS AND GRILL					

Collaborate: Yes No

Hours Per Week: 40

Work Location: VITA - Eastern Office

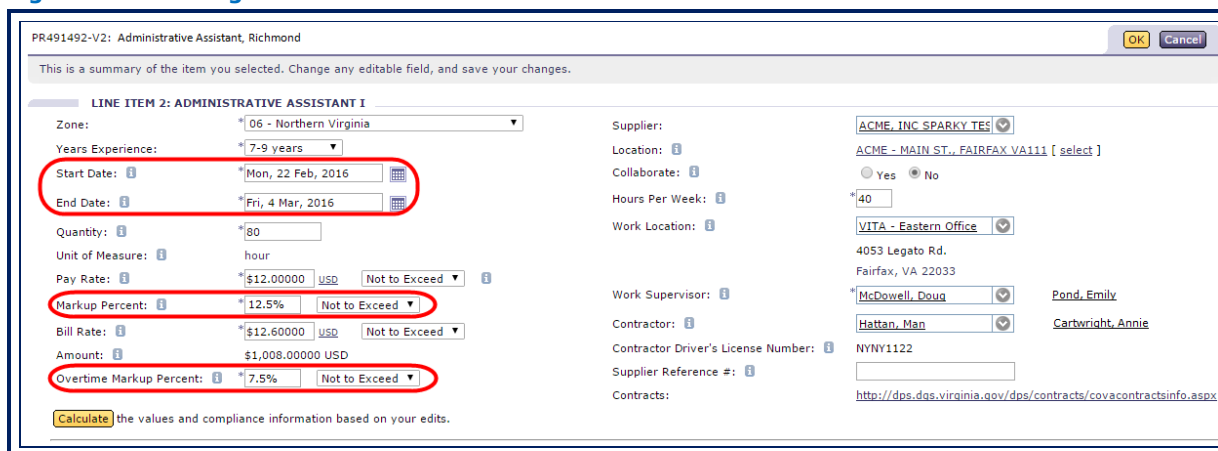
4053 Legato Rd.
Fairfax, VA 22033

Work Supervisor: McDowell, Doug

TEMPORARY LABOR REQUESTS

When you turn off Collaboration, the screen will refresh to add all of the markup and rate fields (**Figure 137**). First, you will want to adjust the **Start** and **End** dates. On the first line item, you changed the **End Date** to the last day the old markup rate was in effect. Now, on the second line item, you will change the **Start Date** to the first day the new markup rate is in effect, and the **End Date** to the last day of the contractor's assignment (the original end date).

Figure 137: Editing a Line Item



PR491492-V2: Administrative Assistant, Richmond

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM 2: ADMINISTRATIVE ASSISTANT I

Zone: *06 - Northern Virginia

Years Experience: *7-9 years

Start Date: *Mon, 22 Feb, 2016

End Date: *Fri, 4 Mar, 2016

Quantity: *80

Unit of Measure: *hour

Pay Rate: *\$12.00000 USD Not to Exceed

Markup Percent: *12.5% Not to Exceed

Bill Rate: *\$12.60000 USD Not to Exceed

Amount: *\$1,008.00000 USD

Overtime Markup Percent: *7.5% Not to Exceed

Supplier: ACME, INC SPARKY TES

Location: ACME - MAIN ST., FAIRFAX VA111 [select]

Collaborate: ☐ Yes ☒ No

Hours Per Week: *40

Work Location: *VITA - Eastern Office

4053 Legato Rd.
Fairfax, VA 22033

Work Supervisor: *McDowell, Doug Pond, Emily

Contractor: *Hattan, Man Cartwright, Annie

Contractor Driver's License Number: *NYYN1122

Supplier Reference #: *

Contracts: <http://dps.dqs.virginia.gov/dps/contracts/covacontractsinfo.aspx>

Calculate the values and compliance information based on your edits.

When the dates are correct, enter the new markup percentages. Click **Calculate** to update the **Bill Rate** according to the new markup percentage. Next, click **OK** to return to the **Summary** tab, where you will see the new bill rate on Line Item 2. Reselect the applicable contractor using the drop-down list in the contractor field.

Because a change that affects cost is considered a substantive change, the request must be approved again. When you have reviewed your changes and are satisfied that everything is correct, submit the requisition for approval.

10. SEARCHING THE eMALL

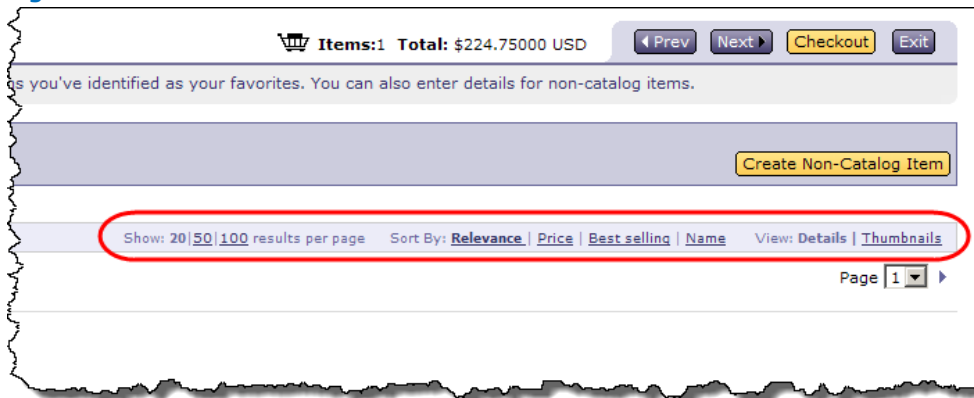
Before you search for catalog items, you might find it helpful to understand how you can control the way in which you view search results. The more you learn about searching the eMall, the better your results will be.

VIEWING SEARCH RESULTS

Figure 138 shows the controls that determine how your search results will be presented. These controls regulate:

- Number of results per page
- Sort Order
- View

Figure 138: Search Results Controls



For number of results per page, you can choose 20, 50, or 100 depending on personal preference and available bandwidth (20 results will load faster than 50, but 50 results per page means fewer pages to load).

"SORT BY:" OPTIONS

The **Sort By:** options allow you to view search results in several ways, as shown in Table 15.

Table 15: Sorting Search Results

Sort Option	Results
Relevance	<ul style="list-style-type: none"> • Best match to keywords • Default sorting option
Price	<ul style="list-style-type: none"> • Defaults to ascending order (lowest to highest) • Can be reversed by clicking the arrow next to the <u>Price</u> link
Bestselling	<ul style="list-style-type: none"> • By sales in descending order (highest to lowest)
Name	<ul style="list-style-type: none"> • Alphabetically by supplier • Can reverse order by clicking the arrow next to the <u>Name</u> link

SEARCHING THE eMALL

Regardless of the original sort order, you can re-sort your results at any time by clicking one of the other sorting criteria.

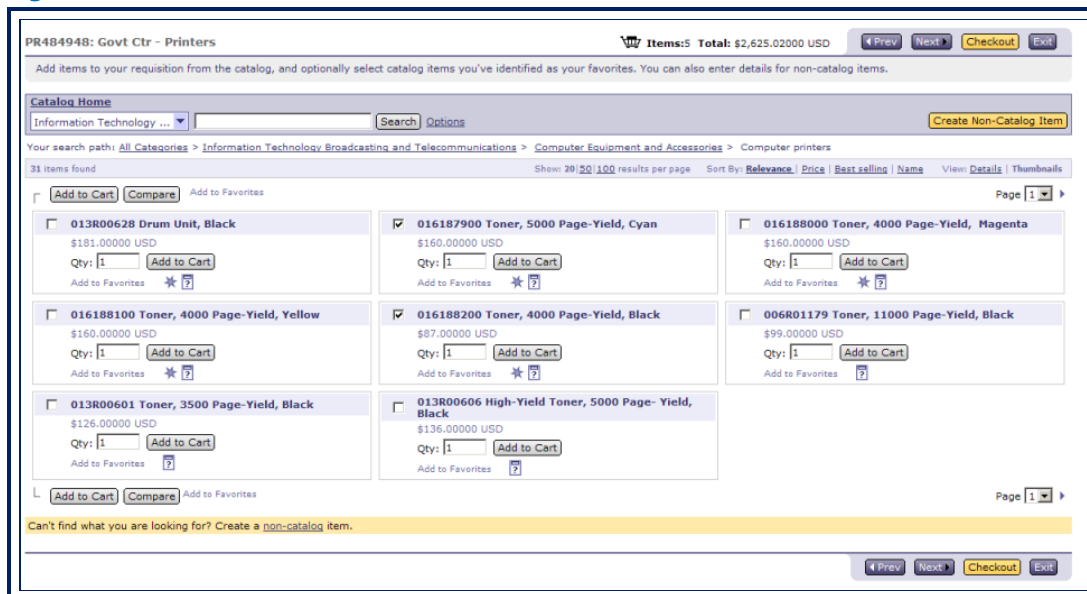
"VIEW" OPTIONS

You can choose between two views, details or thumbnails.

Thumbnails

The Thumbnails view (Figure 139) shows the item description and price. It allows you to enter a quantity and add the item to your shopping cart.

Figure 139: Thumbnail View of Search Results



PR484948: Govt Ctr - Printers Items:5 Total: \$2,625.02000 USD [Prev](#) [Next](#) [Checkout](#) [Exit](#)

Add items to your requisition from the catalog, and optionally select catalog items you've identified as your favorites. You can also enter details for non-catalog items.

[Catalog Home](#) [Information Technology ...](#) [Search](#) [Options](#) [Create Non-Catalog Item](#)

Your search path: [All Categories](#) > [Information Technology, Broadcasting and Telecommunications](#) > [Computer Equipment and Accessories](#) > [Computer printers](#)

31 items found Show: 20/20/100 results per page Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page 1 of 1

<input type="checkbox"/> 013R00628 Drum Unit, Black \$181.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	<input checked="" type="checkbox"/> 016187900 Toner, 5000 Page-Yield, Cyan \$160.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	<input type="checkbox"/> 016188000 Toner, 4000 Page-Yield, Magenta \$160.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?
<input type="checkbox"/> 016188100 Toner, 4000 Page-Yield, Yellow \$160.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	<input checked="" type="checkbox"/> 016188200 Toner, 4000 Page-Yield, Black \$87.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	<input type="checkbox"/> 006R01179 Toner, 11000 Page-Yield, Black \$99.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?
<input type="checkbox"/> 013R00601 Toner, 3500 Page-Yield, Black \$125.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	<input type="checkbox"/> 013R00606 High-Yield Toner, 5000 Page-Yield, Black \$136.00000 USD Qty: <input type="text"/> Add to Cart Add to Favorites ?	

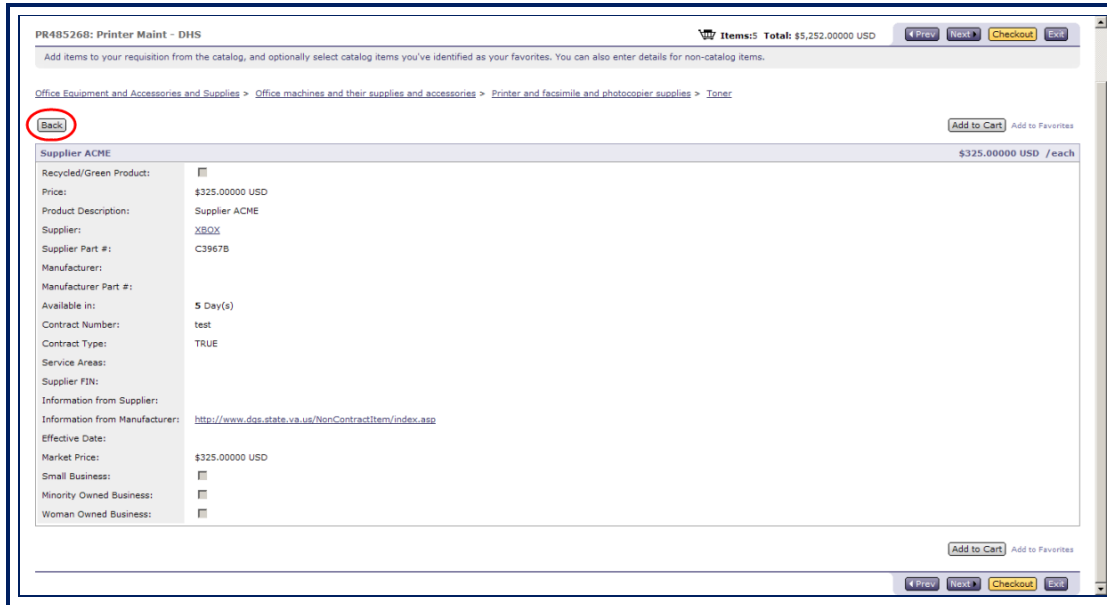
[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page 1 of 1

Can't find what you are looking for? [Create a non-catalog item.](#)

[Prev](#) [Next](#) [Checkout](#) [Exit](#)

To view more information for a particular item, click the item description. A new screen will open to show all of the details provided by the supplier (**Figure 140**). When you have finished reviewing the product details, click **Back** to return to the catalog search results.

Figure 140: Individual Product Detail Screen



Details

The Details view (**Figure 141**) provides the same information as the Thumbnails view, as well as additional details, such as:

- Supplier
- Manufacturer
- Part Numbers
- SWAM designations
- Contract Number information

Figure 141: Details View of Search Results

PR484948: Govt Ctr - Printers Items:6 Total: \$5,825.00000 USD [Prev](#) [Next](#) [Checkout](#) [Exit](#)

Add items to your requisition from the catalog, and optionally select catalog items you've identified as your favorites. You can also enter details for non-catalog items.

[Catalog Home](#) [Engineering and Research and ...](#) [Search](#) [Options](#) [Create Non-Catalog Item](#)

Your search path: [All Categories](#) > [Engineering and Research and Technology Based Services](#) > [Computer services](#) > [System administrators](#) > [Data storage](#)

2 items found Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to Favorites](#)

<p>ck1 1 BROCADE SECURE FAB OPSYS-2DAY</p> <p>\$1,995.00000 USD ?</p> <p>Qty: <input type="text"/></p> <p>Add to Cart Add to Favorites</p>	<p>Supplier: CK1</p> <p>Supplier Part #: TRNBR22-0000</p> <p>Recycled/Green Product: <input type="checkbox"/></p> <p>Contract Type: 5-Optional</p> <p>Contract #: VA-040330-DALN</p> <p>Effective Date: ?</p> <p>Contract Link: ?</p> <p>Available in: 21 Day(s)</p> <p>Manufacturer Name: StorageTek Corp.</p> <p>P-Cards Accepted: VISA; Master Card; AMEX</p> <p>Service Areas: ALL</p> <p>Small Business: <input type="checkbox"/></p> <p>Minority Owned Business: <input type="checkbox"/></p> <p>Woman Owned Business: <input type="checkbox"/></p> <p>ck1 1 BROCADE SECURE FAB OPSYS-2DAY</p>
<p>ck1 2 BROCADE SECURE FAB OPSYS-2DAY</p> <p>\$1,995.00000 USD ?</p> <p>Qty: <input type="text"/></p> <p>Add to Cart Add to Favorites</p>	<p>Supplier: CK1</p> <p>Supplier Part #: TRNBR22-0001</p> <p>Recycled/Green Product: <input type="checkbox"/></p> <p>Contract Type: 5-Optional</p> <p>Contract #: VA-040330-DALN</p> <p>Effective Date: ?</p> <p>Contract Link: ?</p> <p>Available in: 21 Day(s)</p> <p>Manufacturer Name: StorageTek Corp.</p> <p>P-Cards Accepted: VISA; Master Card; AMEX</p> <p>Service Areas: ALL</p> <p>Small Business: <input type="checkbox"/></p> <p>Minority Owned Business: <input type="checkbox"/></p> <p>Woman Owned Business: <input type="checkbox"/></p> <p>ck1 2 BROCADE SECURE FAB OPSYS-2DAY</p>

[Add to Cart](#) [Compare](#) [Add to Favorites](#)

Can't find what you are looking for? [Create a non-catalog item.](#)

[Prev](#) [Next](#) [Checkout](#) [Exit](#)

VIEWING SUPPLIER DETAILS

Each item has a link to the supplier that provided the catalog item. Click the supplier name to view additional details; click **Done** to return to the item summary (Figure 142).

Figure 142: Click Supplier Name Link to See Details

Supplier: [CENTREVILLE AGRICULTURAL EQUIPMENT](#)

Supplier Part #: Contract Category

Recycled/Green Product: ☐

Contract Type: 2-Mandatory Contract

Contract #: FoRSplTest

Effective Date: [?](#)

Contract Link: [?](#)

Available in: **30** Day(s)

Manufacturer Name:

P-Cards Accepted: AMEX

Service Areas:

Small Business: ☐

Minority Owned Business: ☐

Woman Owned Business: ☐

PROD 869 regular



Review Details for Supplier

These are the details for the field you selected.

Customer:	No
Supplier:	Yes
Company:	CENTREVILLE AGRICULTURAL EQUIPMENT
Corporate Website:	

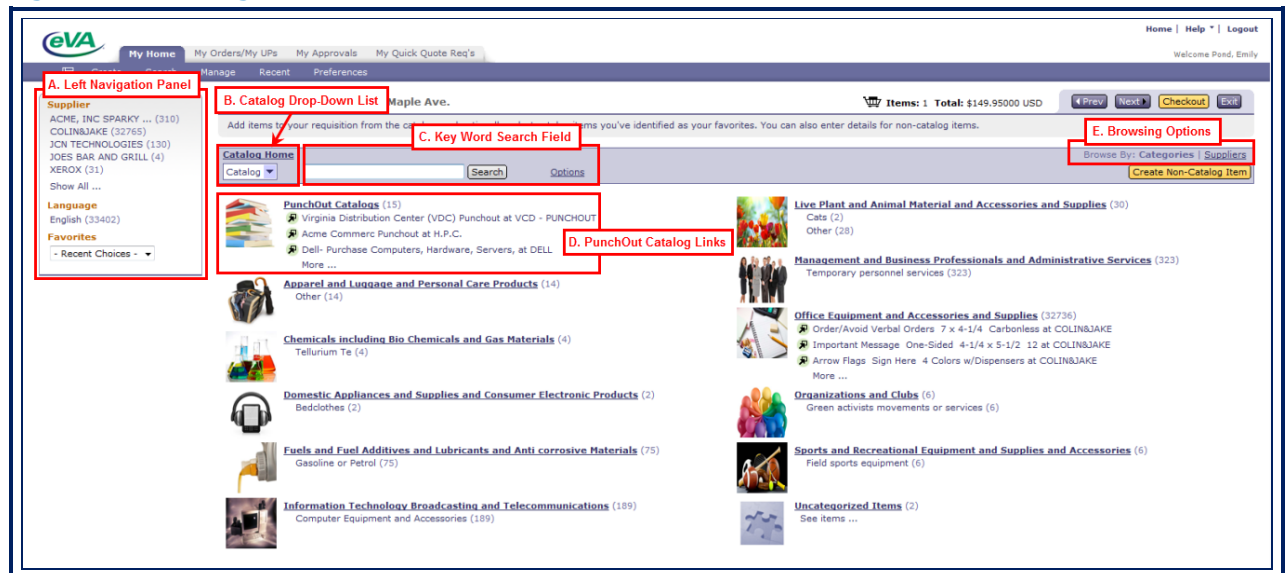
[Done](#)

CATALOG HOME SCREEN

Now that you have an understanding of the various display options for your search results, it is time to learn more about how to obtain them. Your searches will start at the **CATALOG HOME** screen (Figure 143).

Catalog items are categorized by commodity type. These categories are built dynamically, based on items currently available in supplier catalogs. In the default view of the catalog home page, product categories are displayed in bold text, with sub-categories displayed beneath them.

Figure 143: Catalog Home Screen



A LEFT NAVIGATION PANEL

On the Catalog Home screen, the left navigation panel works in conjunction with the browsing options (E.), which allow you to display either commodity categories (the default view) or suppliers. Whichever you choose, the left navigation panel presents the headings from the other format in expandable list form; for example, if your **CATALOG HOME** screen is displaying commodity categories, the left navigation panel offers a list of suppliers.

B CATALOG DROP-DOWN LIST

Commodity searches can be performed using the same procedure as such familiar websites as eBay or Amazon, drilling down through a hierarchy of commodity categories to get to a group of similar items. See [Option 1: Drill Down Through Commodity Categories](#) for detailed instructions.

You can select the catalog you want to search by clicking the appropriate link on the Catalog Home screen. You can also select from the **Catalog Drop-Down** list, which allows you to move from one catalog to another without returning to the **CATALOG HOME** screen.

C KEYWORD SEARCH FIELD

Keyword searches are probably familiar to you from using Internet search engines. They use a single text box into which you enter the search terms ("keywords") most likely to return the results you need. Keyword searches allow you to find items by matching specific words, supplier names, contract numbers, or product numbers. For more information, see [Option 2: Search by Keywords](#).

Advanced search options provide detail fields that allow you to refine a search. See [Option 3: Advanced Search](#) for more information.

D PUNCHOUT CATALOG LINKS

Use the [PunchOut Catalog](#) links on the **CATALOG HOME** screen to navigate to a PunchOut catalog, where you will be able to execute keyword searches on the supplier's website.

E BROWSING OPTIONS

Using the [Browse By](#) links, you can choose to display either commodity categories (the default view) or suppliers on this screen.

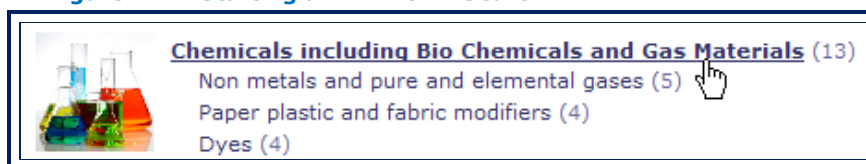
HOW TO FIND ITEMS

The sections below provide details about how to use the various search tools available on the **CATALOG HOME** screen.

OPTION 1: DRILL DOWN THROUGH COMMODITY CATEGORIES

Select the highest level of one of the displayed categories and drill down through the sub-categories to find the specific set of items you want.

Figure 144: Starting a Drill-Down Search



To find your specific item within a broad category of commodities, drill down through the levels of subcategories, as shown in **Table 16**.

Table 16: Drill-Down Category Levels

Catalog Level	Example
Segment	Lighting and Electrical Accessories and Supplies
Family	Lamps and light bulbs and lamp components
Group	Lamps
Category	Fluorescent lamps

Not all items have been identified down to the Category level. You will know you have drilled all the way down in a particular category when the returned screen contains individual items rather than a set of links.

If you prefer to search by supplier name, you can

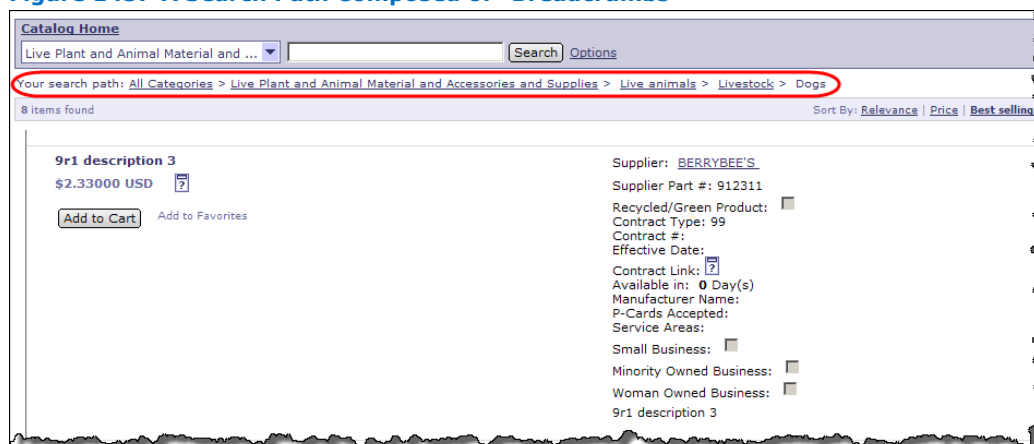
- Use the links provided in the left navigation panel
- Use the **Browse By** options to change to the **Supplier** view

Refer to **Figure 143 A** and **E** for an illustration of these features.

eVA will display the results set in either detail or thumbnail format, depending on which view you have selected.

eVA will also display the path you took to get to an item listing as a series of links. The links that make up such paths are often called *breadcrumbs*, because they make a trail you can use to return to any earlier level on the path by clicking the appropriate link. In **Figure 145**, the search path used to reach the displayed listing is *Entire Catalog > Live Plant and Animal Material and Accessories and Supplies > Live animals > Livestock > Dogs*.

Figure 145: A Search Path Composed of “Breadcrumbs”



OPTION 2: SEARCH BY KEYWORDS

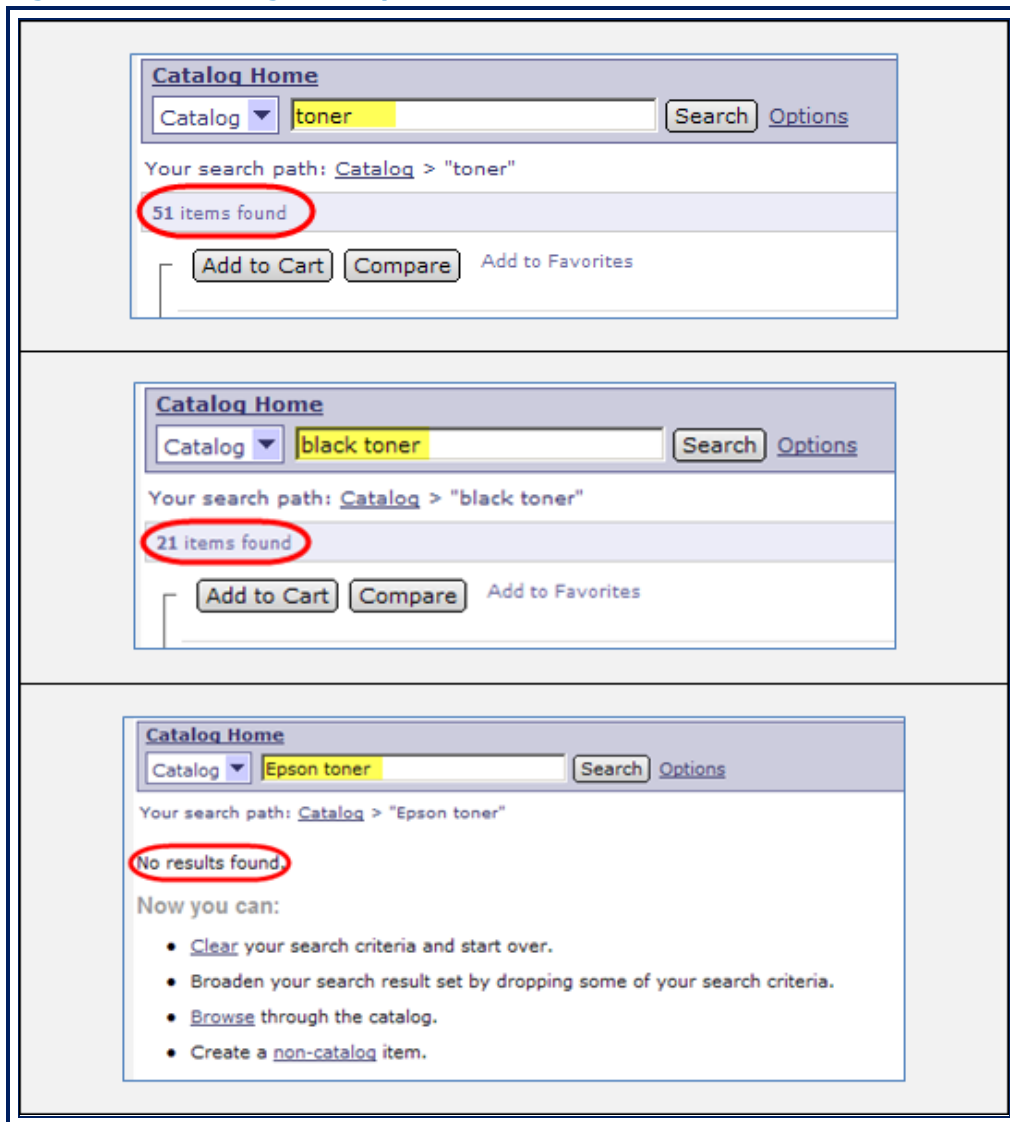
Keyword searches use a single text box into which you enter the search terms (“keywords”) most likely to return the results you need. If you choose terms that are too broad, the system can return an unmanageable number of results; if your terms are too narrow, you might not get any results.

Figure 146 demonstrates this concept. A search for *Toner* returns approximately 51 items (remember that even if you enter exactly the same search terms, you might get a different number of results because of the dynamic nature of the eMall). If you narrow your search by specifying *Black Toner* in the search field, the number of results falls to a more manageable 21; however, an even narrower search for a specific brand of toner returns no results.

SEARCHING THE eMALL

If there is only one acceptable result, then a narrow search allows you to quickly discover whether the item you need is available through a catalog or if you must enter it as a [non-catalog](#) item; however, if you have more leeway, then too narrow a search can eliminate valid options.

Figure 146: Searching with Keywords



The figure displays three sequential screenshots of the eMALL search interface, illustrating the results of keyword searches. Each screenshot shows a search bar with a dropdown menu set to 'Catalog' and a search button. The search results are displayed below the search bar, with the number of items found circled in red.

Search 1: 'toner'

- Search path: [Catalog](#) > "toner"
- 51 items found
- Buttons: [Add to Cart](#), [Compare](#), [Add to Favorites](#)

Search 2: 'black toner'

- Search path: [Catalog](#) > "black toner"
- 21 items found
- Buttons: [Add to Cart](#), [Compare](#), [Add to Favorites](#)

Search 3: 'Epson toner'

- Search path: [Catalog](#) > "Epson toner"
- No results found
- Now you can:

 - [Clear](#) your search criteria and start over.
 - Broaden your search result set by dropping some of your search criteria.
 - [Browse](#) through the catalog.
 - Create a [non-catalog](#) item.

The keyword search is also the most efficient means of locating a specific supplier.

AND/OR Logic

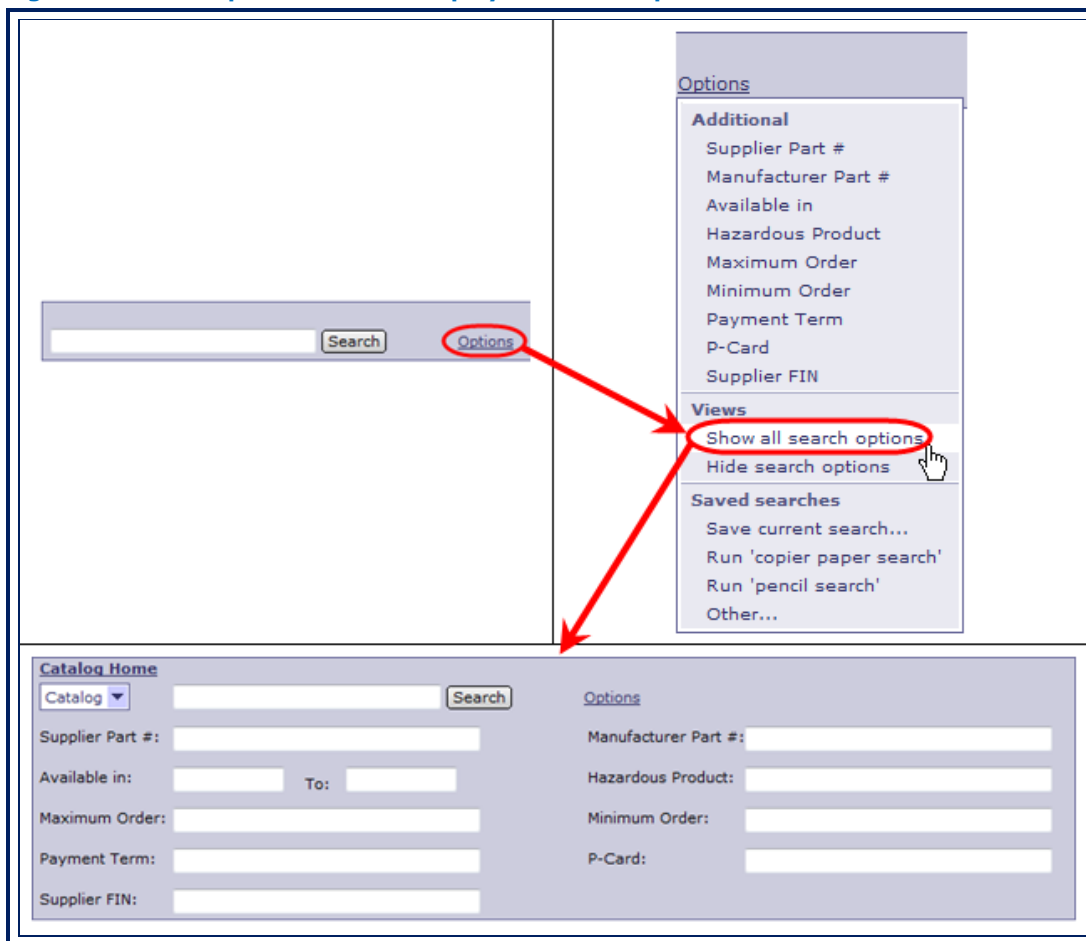
If you enter more than one word in a search field, you are telling the search engine that you want only results that contain *all* of those words. For example, if you enter *Apple Macintosh*, eVA might return only Apple, Inc.'s Macintosh computers and its family of parts or peripherals.

If you are trying to find results that include *any* of the words you entered, you must specify OR between words. In this case you would enter Apple OR Macintosh. eVA will then return all entries for apples and all entries for Macintosh.

OPTION 3: ADVANCED SEARCH – KEYWORDS PLUS OPTIONS

You can create a more specific search using the additional search tools under the **Options** menu. Click the [Options](#) link, and then select one of the additional search fields from the menu that opens (**Figure 147**). Note that you can select only one field at a time. If you want to use more than one additional parameter in your search, select *Show all search options* to expand the **Search** section.

Figure 147: Use Options Menu to Display All Search Options

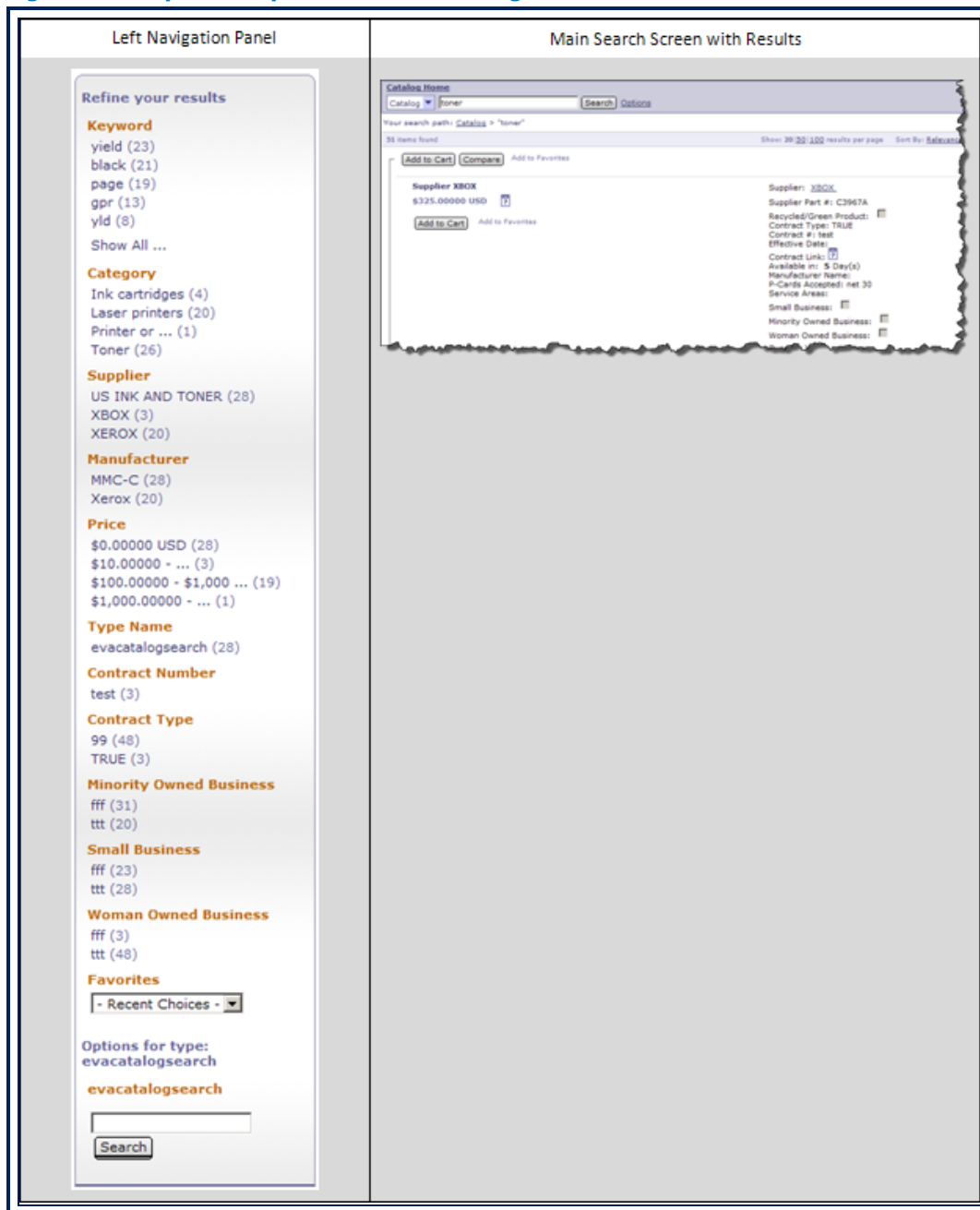


These additional options fields will be visible under your search textbox until you return to the **Options** menu and clear them. Even when selected, these additional search fields are never required; you can use any or none of them, in conjunction with or separately from the original keyword **Search** field.

Refining Search Results

You can refine your search results using selections from the **SEARCH** screen left navigation panel. Going back to the example used in the [Search by Keywords](#) section, enter the word "toner" in the keyword search field and click **Search**, but this time, when the results appear, look at what happens in the left navigation panel (**Figure 148**).

Figure 148: Dynamically Generated Left Navigation Panel



The left navigation panel on your **SEARCH** screen is dynamically generated from the results set created by your query. As shown in **Figure 148**, the first section is a list of keywords in descending order of frequency, followed by other groupings such as category and price.

Table 17 describes the kinds of search criteria you can choose in the left navigation panel.

Table 17: Types of Search Criteria Found in Left Navigation Panel

Search Criteria	Definition
Keyword	<ul style="list-style-type: none"> In this context, a keyword is a descriptive term designed to narrow a specific set of search results Listed in descending order of frequency <p>NOTE: Keywords might or might not be present, depending on the number of items in the results set.</p>
Category	<ul style="list-style-type: none"> The most granular level of commodity hierarchy Search results may include items from several categories
Supplier	<ul style="list-style-type: none"> Narrows search to only those items available from a particular supplier
Manufacturer	<ul style="list-style-type: none"> Narrows search to only those items produced by a particular manufacturer
Price	<ul style="list-style-type: none"> Narrows search by price Displayed in bands, such as \$0 - \$10.00, \$10.00 - \$100.00, etcetera
Type Name	<ul style="list-style-type: none"> Search terms made available by the vendor to help buyers find what they are looking for in a catalog
Contract Number	<ul style="list-style-type: none"> Narrows search to specified contract number
Contract Type	<ul style="list-style-type: none"> Sorts by contract type such as Agency, Mandatory, Optional, and so on
Minority Owned Business	<ul style="list-style-type: none"> Narrows search to items available from minority-owned businesses
Small Business	<ul style="list-style-type: none"> Narrows search to items available from small businesses
Woman Owned Business	<ul style="list-style-type: none"> Narrows search to items available from woman-owned businesses
Micro Business	<ul style="list-style-type: none"> Narrows search to items available from micro businesses

The attributes listed in the left navigation panel after a search often provide different results than the same attributes would produce if used as the criteria for a new search.

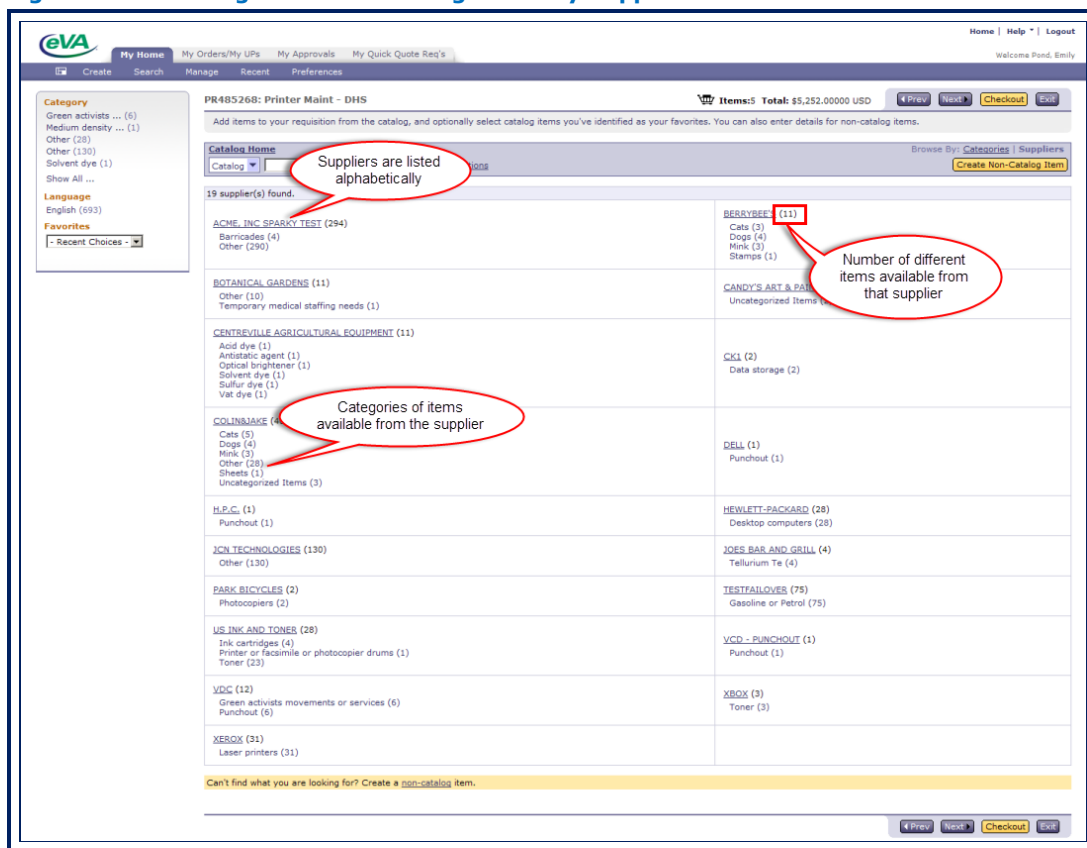
For example, if you start a new keyword search with the word *yield*, your results will probably include a jumble of agriculture-, construction-, and office-related items. However, if you have already searched for toner and now want to narrow the results to return only toner cartridge listings that specify how many pages a given cartridge will print, selecting the keyword 'yield' will produce those results.

OPTION 4: BROWSE FOR ITEMS BY SUPPLIER

As mentioned previously, you can change the **CATALOG HOME** screen from the default **Catalog** view (Figure 143) to the **Supplier** view (Figure 149). Suppliers will be listed alphabetically, each displaying a list of the categories of items available from that supplier.

This display option offers an excellent way to “window shop” the eMall, just getting a feel for participating suppliers and the kinds of commodities they carry.

Figure 149: Catalog Home Screen Organized by Supplier



The screenshot shows the eMall interface with the 'Catalog Home' view selected. The left sidebar contains navigation options like 'Category', 'Language', and 'Favorites'. The main content area displays a list of suppliers and their available items. Three callouts are present:

- Suppliers are listed alphabetically:** Points to the 'Catalog Home' dropdown menu.
- Number of different items available from that supplier:** Points to the item count '(11)' next to 'BERRYBEE'.
- Categories of items available from the supplier:** Points to the list of categories under 'COLINNAIVE'.

Supplier	Item Count	Categories
ACME, INC SPARKY TEST	(294)	Barricades (4), Other (290)
BOTANICAL GARDENS	(11)	Other (10), Temporary medical staffing needs (1)
CENTREVILLE AGRICULTURAL EQUIPMENT	(11)	Acid dye (1), Artistic agent (1), Optical brightener (1), Solvent dye (1), Sulfur dye (1), Vat dye (1)
COLINNAIVE	(4)	Cats (5), Dogs (4), Mink (2), Other (28), Sheets (1), Uncategorized Items (3)
H.P.G.	(1)	Punchout (1)
ICON TECHNOLOGIES	(130)	Other (130)
PARK BICYCLES	(2)	Photocopiers (2)
US INK AND TONES	(28)	Ink cartridges (4), Printer or facsimile or photocopier drums (1), Toner (23)
VDC	(12)	Green activists movements or services (6), Punchout (6)
XEROX	(31)	Laser printers (31)
BERRYBEE	(11)	Cats (3), Dogs (4), Mink (3), Stamps (1)
CANDY'S ART & PAINT	(1)	Uncategorized Items (1)
CEC	(2)	Data storage (2)
DELL	(1)	Punchout (1)
HEWLETT-PACKARD	(28)	Desktop computers (28)
JOES BAR AND GRILL	(4)	Tellurium Ta (4)
TESTALOYES	(75)	Gasoline or Petrol (75)
VCD - PUNCHOUT	(1)	Punchout (1)
XBOX	(3)	Toner (3)

SEARCH STRATEGIES

When you begin to shop for specific items among the millions of available catalog items, you will need a search strategy. Your search strategy will depend on the kind of shopping you need to do.

If you are looking for a specific item, you will want to create a very narrow search. Entering a contract number, part number, or supplier name will usually take you to exactly what you want.

On the other hand, if you are shopping for a best buy with only general requirements to meet, you will want to broaden your search to include items that generally identify what you want, probably by using commodity categories or general keywords.

If that strategy produces too many results, then you can gradually narrow your search using the left navigation panel prompts until a manageable number of results is returned.

SAVING A SEARCH

There are a number of reasons you might want to save a search to reuse in the future. After you run a search that return the results you want, open the **Options** menu and select *Save current search ...* (Figure 150). You will be prompted to name the search. Enter a descriptive name and click **Save** to return to the search results.

Figure 150: Saving a Search



SEARCHING THE eMALL

If you have saved past searches, you can access them by clicking the **Options** menu on the **CATALOG HOME** screen and then selecting the desired search (Figure 151). After the search has run, add the item(s) you want to your shopping cart.

Figure 151: Running a Saved Search



FAVORITE ITEMS

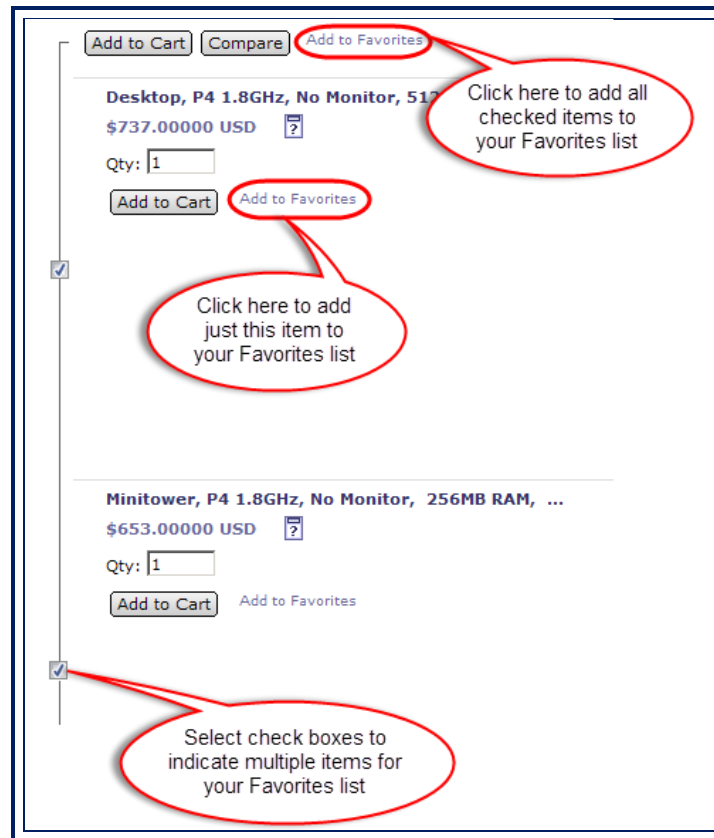
As mentioned in the section on [Adding Items](#) to your requisition, if there are catalog items that you order frequently, you can mark these items as Favorites so that you can find them quickly and easily when you are ready to purchase them again.

ADDING ITEMS TO FAVORITES

After you perform a successful search, you can add one or more of the items in the results set to your Favorites list (Figure 152).

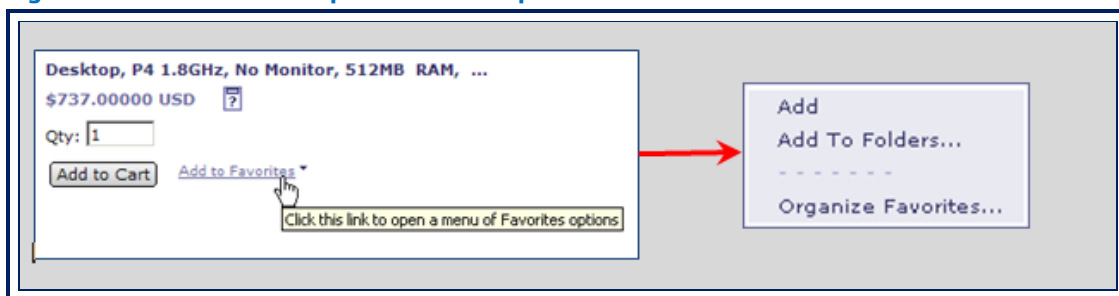
To add a single item, click the [Add to Favorites](#) link next to the **Add to Cart** button in the item description. You can add multiple items at one time just as you would choose multiple items for your shopping cart: select the checkbox next to each item you want, and then click the **Add to Favorites** link near the top of the screen.

Figure 152: Add Individual or Multiple Items to Favorites



You can also add an item to your Favorites list from the item's **PRODUCT DETAIL** screen. When you click any Add to Favorites link, the **Favorites Options** menu will open (Figure 153).

Figure 153: Click Link to Open Favorites Options Menu

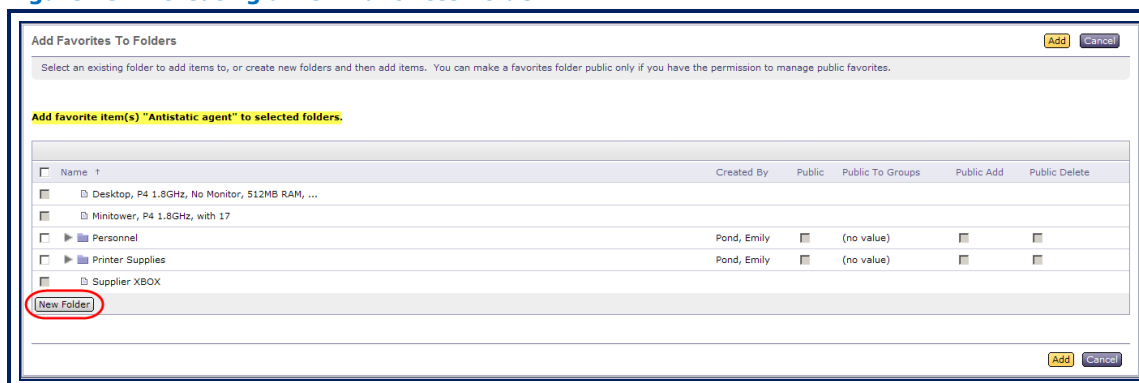


If you are familiar with the way Favorites or Bookmarks work in your internet browser, you will recognize the design of the **Favorites Options** menu. You can opt to place the new favorite in a folder you have already created, or to create a new Favorites folder (both accessed by selecting *Add To Folders*), or you can add it to your Favorites list without placing it in a folder (by selecting *Add*).

CREATING A NEW FAVORITES FOLDER

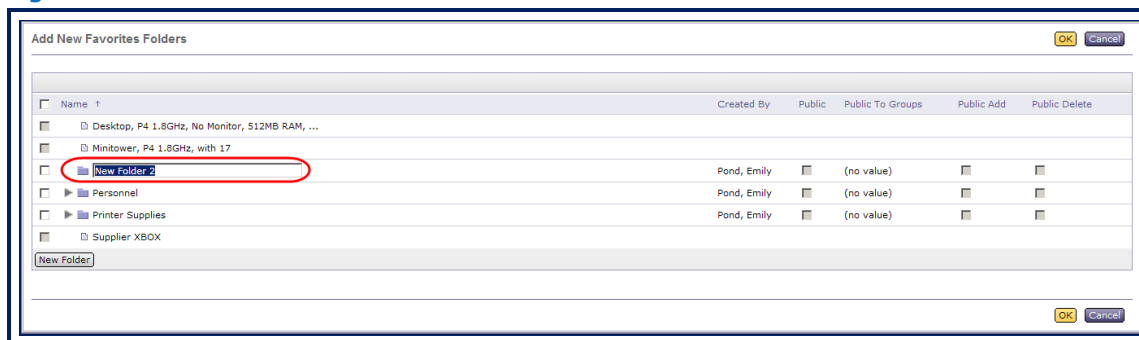
There are two ways to create a new Favorites folder. If you have found an item that you want to mark as a favorite but you do not have an appropriate folder for it, start by selecting *Add to Folders* from the **Favorites Options** menu. Then, when the **ADD FAVORITES TO FOLDERS** screen opens (Figure 154), click **New Folder**.

Figure 154: Creating a New Favorites Folder



The new folder will be created with an editable, generic name. In the example shown in Figure 155, the temporary folder name is *New Folder 2*.

Figure 155: New Favorites Folder Added as 'New Folder 2'



Select the assigned generic name and change it to a name that is descriptive of the contents you plan to store in the folder. When you are finished, click **OK** to return to the **ADD FAVORITES TO FOLDERS** screen. Your new folder will be selected and you will see a confirmation message near the top of the screen, as shown in Figure 156.

Click **OK** to add the item to the newly created **Favorites** folder.

Figure 156: Adding Item to New Favorites Folder



Add Favorites To Folders

Select an existing folder to add items to, or create new folders and then add items. You can make a favorites folder public only if you have the permission to manage public favorites.

Add favorite item(s) "Antistatic agent" to selected folders.

Name	Created By	Public	Public To Groups	Public Add	Public Delete
Minitor, P4 1.8GHz, with 17					
<input checked="" type="checkbox"/> Fabric Modifiers	Pond, Emily	<input type="checkbox"/> (no value)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Personnel	Pond, Emily	<input type="checkbox"/> (no value)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Printer Supplies	Pond, Emily	<input type="checkbox"/> (no value)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Supplier XBOX					

New Folder

Add Cancel

ADDING A FAVORITE ITEM TO A REQUISITION

Starting from an open requisition, go to the **CATALOG HOME** screen (Figure 32). The **Favorites** drop-down list appears at the bottom of the left navigation panel. Click the down arrow to see your Favorites folders, as shown in Figure 157.

Figure 157: The Favorites List Appears on the Catalog Home Screen



Supplier

ACME, INC SPARKY ... (294)
COLIN&JAKE (56)
H.P.C. (1)
JCN TECHNOLOGIES (130)
XEROX (31)
Show All ...

Language

English (703)

Favorites

- Recent Choices -
- Recent Choices -
- Personnel
- Printer Supplies
-
- Other...

PR484948: Govt Ctr - Printers

Add items to your requisition from the catalog, and optionally select catalog items you

Catalog Home

Catalog Search Options

Purchasing Agreement

Purchasing Agreement (1)

PunchOut Catalogs (10)

- Acme Commerc Punchout at H.P.C.
- Virginia Distribution Center (VDC) Punchout at VDC - PUNCHOUT
- Dell- Purchase Computers, Hardware, Servers, at DELL
- More ...

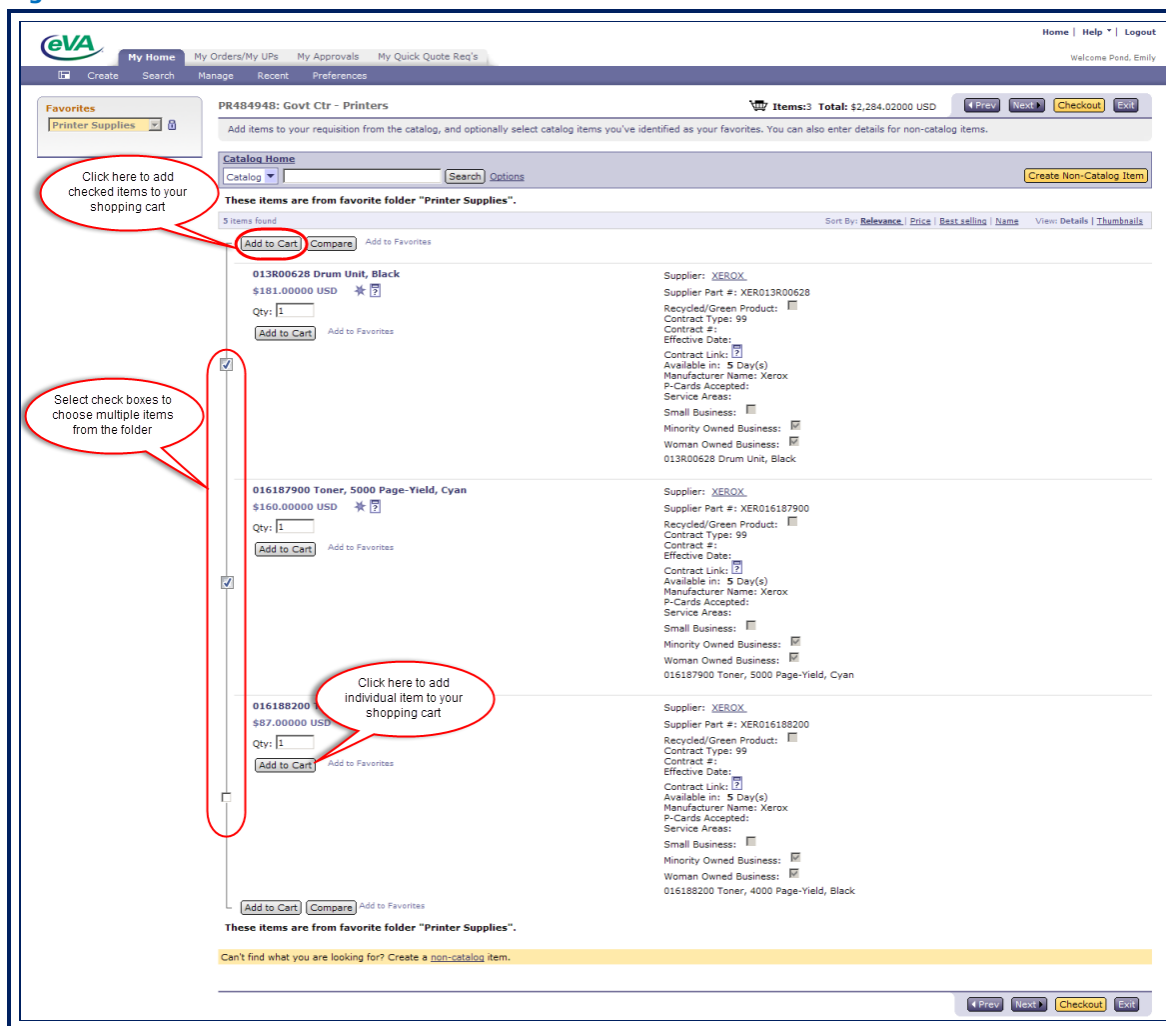
Apparel and Luggage and Personal Care Products (8)

Other (8)

SEARCHING THE eMALL

Select a folder from the drop-down list to display its contents (Figure 158).

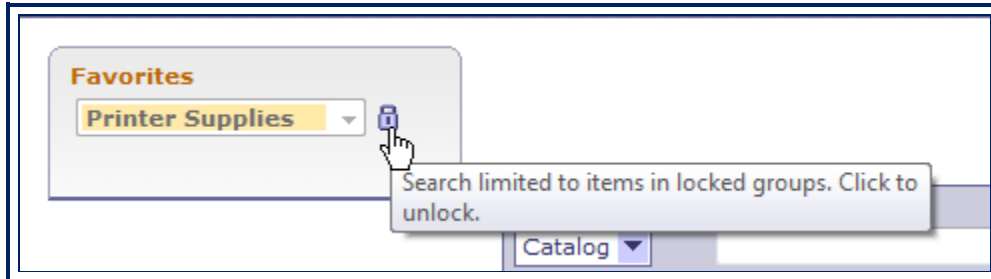
Figure 158: Contents of Favorites Folder



You can add an individual favorite item to your shopping cart, or you can choose multiple items from the open **Favorites** folder and add them all at once, as shown in Figure 158.

When you open a **Favorites** folder, the selection field will lock, indicated by a small padlock icon (**Figure 159**). If you want to look in a different Favorites folder, or change to another search method, you must first click the padlock to unlock the field.

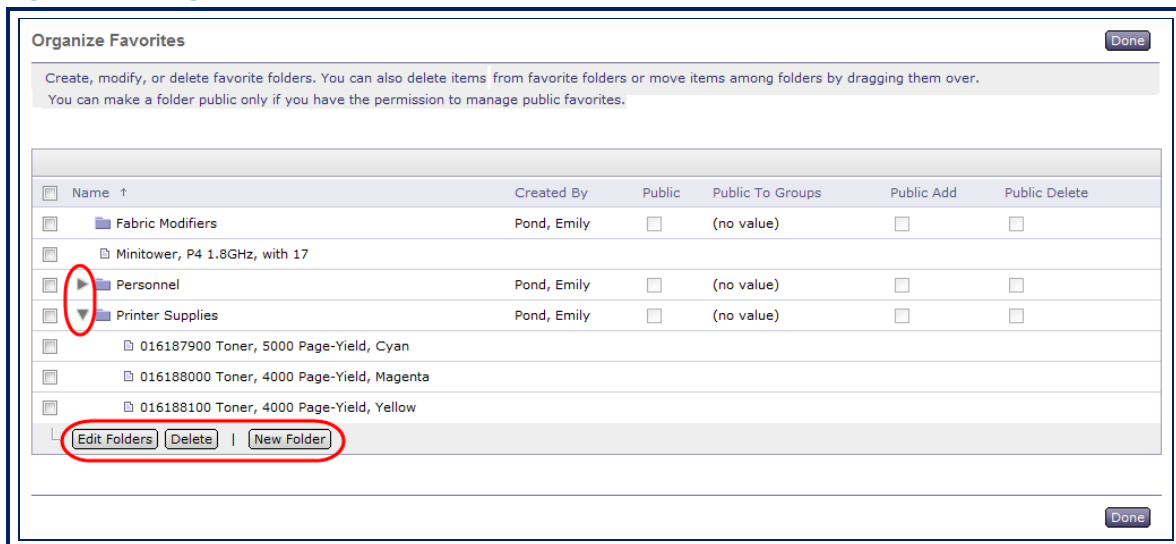
Figure 159: Locked Favorites Field



ORGANIZING FAVORITES

Select *Organize Favorites* from the **Favorites Options** menu to open the **ORGANIZE FAVORITES** screen. From this screen, you can edit or delete existing Favorites folders, and create new folders (**Figure 160**). An arrow next to a folder name (►) indicates that the folder contains items. (Note that the **Public Add** and **Public Delete** functionality shown in **Figure 160** is not in use at this time.)

Figure 160: Organize Favorites Screen



Click the arrow to see the contents listed under that folder's name. You can select any item to edit or delete it.

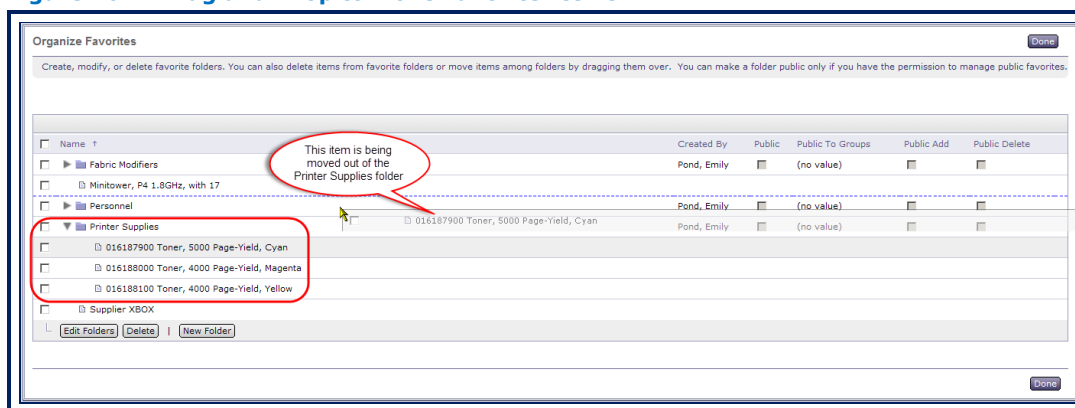
SEARCHING THE eMALL

You can move items into or out of folders and from one folder to another; click to select the item and hold the mouse button to “drag and drop” it to the new location. **Figure 161** shows a folder that has been expanded to display its contents as well as an item in the process of being moved.



NOTE: When a vendor discontinues an item and removes it from the catalog, the item will also disappear from any favorites folders in which it had been saved.

Figure 161: Drag and Drop to Move Favorite Items



11. APPROVING THE REQUISITION

Most requests require approvals. Approvals are automatically assigned based on:

- The user's profile.
- The business rules of the user's agency or organization.
- The dollar amount of the requisition.

Approvals are usually handled by a group of users who have been assigned an approval role. Generally, any user who is a member of that group can approve a requisition, but this is not always the case. Depending on your agency/entity, you might encounter requisitions that must be approved by a specific individual. (NOTE: If the approval flow displays an approval role name instead of an individual, clicking the role name will allow you to view the names of the individuals assigned to that role.)

A final approval is also required when a supplier cannot receive orders electronically. If a supplier cannot receive orders electronically, the requester on the requisition will be inserted as the last approver in the workflow. This is a reminder that the order must be printed and mailed or faxed to the supplier.

Approvers are notified by email when a requisition is awaiting their approval (Figure 162).

Figure 162: Example of Notification Email



ACCESSING APPROVALS

If you are a designated Approver, and you want to access the **APPROVAL SUMMARY** screen for a particular requisition, click the Approve link next to that requisition in your To Do list on the **My Home** tab or the **My Approvals** tab (Figure 163).

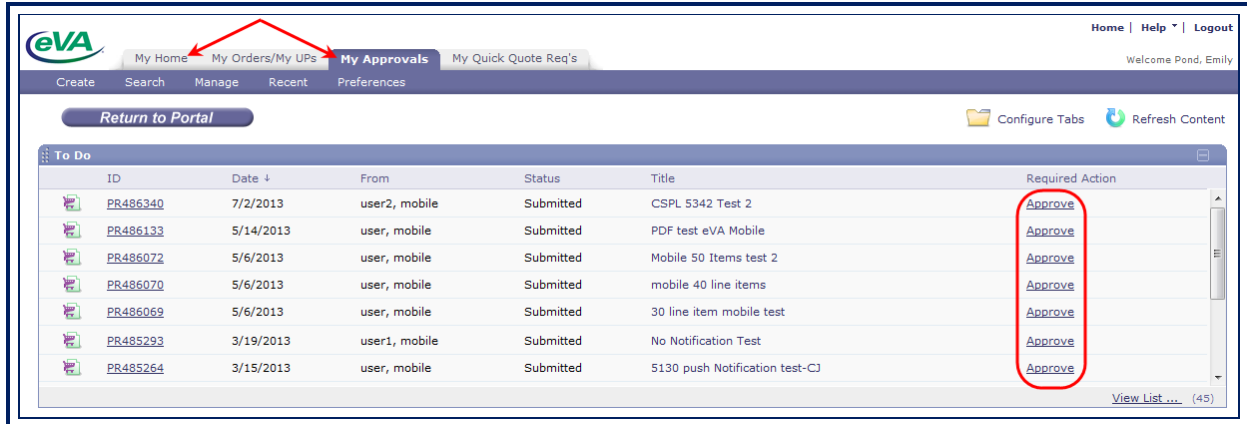


IMPORTANT! Use the **Approve** link, **not** the **Requisition ID**, to access the **APPROVAL SUMMARY** screen.

APPROVING THE REQUISITION

If you use the **Approve** link, you will be able to see all of the accounting details for each line item on the **APPROVAL SUMMARY** screen. If you access the transaction by clicking the **Requisition ID** instead, you will have to drill down into each line item to see the accounting details.

Figure 163: Approvals Accessed via My Home or My Approvals Tabs



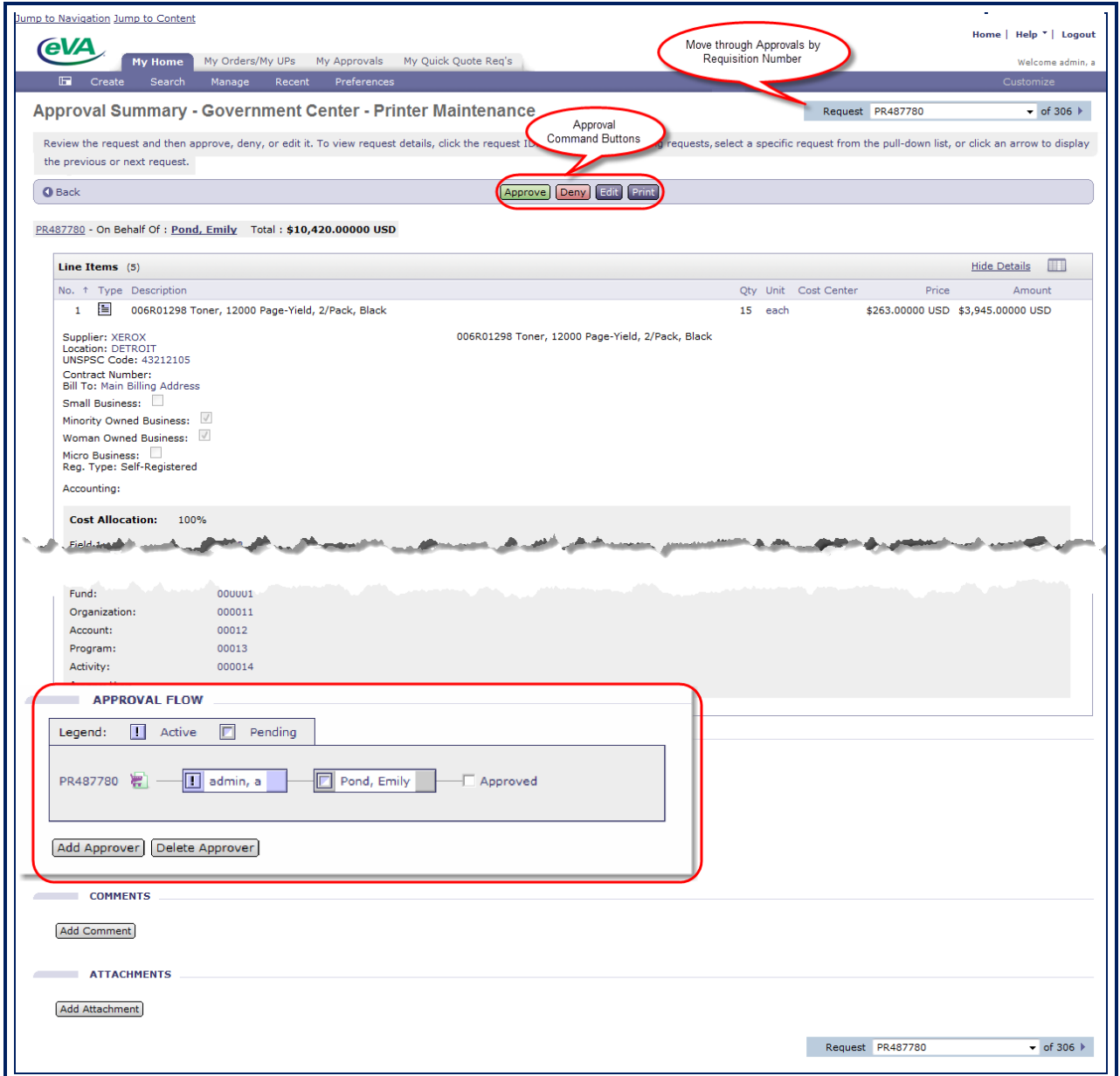
The screenshot displays the eVA system interface. At the top, there are navigation tabs: 'My Home', 'My Orders/My UPs', 'My Approvals' (selected), and 'My Quick Quote Req's'. Below these are sub-tabs: 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. A 'Return to Portal' button is visible. The main content area shows a table of requisitions with columns: ID, Date, From, Status, Title, and Required Action. The 'Required Action' column contains 'Approve' links for each item, which are circled in red. The table lists several requisitions, all with a status of 'Submitted'.

ID	Date	From	Status	Title	Required Action
PR486340	7/2/2013	user2, mobile	Submitted	CSPL 5342 Test 2	Approve
PR486133	5/14/2013	user, mobile	Submitted	PDF test eVA Mobile	Approve
PR486072	5/6/2013	user, mobile	Submitted	Mobile 50 Items test 2	Approve
PR486070	5/6/2013	user, mobile	Submitted	mobile 40 line items	Approve
PR486069	5/6/2013	user, mobile	Submitted	30 line item mobile test	Approve
PR485293	3/19/2013	user1, mobile	Submitted	No Notification Test	Approve
PR485264	3/15/2013	user, mobile	Submitted	5130 push Notification test-CJ	Approve

At the bottom right of the table, there is a link 'View List ... (45)'.

The **APPROVAL SUMMARY** screen (Figure 164) contains all of the information you need to make an approval decision for that requisition, including a detailed list of the line items ordered, the approval flow for the requisition, and any comments the preparer has added.

Figure 164: Approval Summary Screen



Approval Summary - Government Center - Printer Maintenance

Review the request and then approve, deny, or edit it. To view request details, click the request ID. To view previous requests, select a specific request from the pull-down list, or click an arrow to display the previous or next request.

Request: PR487780 of 306

Approval Command Buttons: **Approve** **Deny** **Edit** **Print**

PR487780 - On Behalf Of: **Pond, Emily** Total: **\$10,420.00000 USD**

No.	Type	Description	Qty	Unit	Cost Center	Price	Amount
1		006R01298 Toner, 12000 Page-Yield, 2/Pack, Black	15	each		\$263.00000 USD	\$3,945.00000 USD

Supplier: XEROX
Location: DETROIT
UNSPSC Code: 43212105
Contract Number:
Bill To: Main Billing Address
Small Business: ☐
Minority Owned Business: ☒
Woman Owned Business: ☒
Micro Business: ☐
Reg. Type: Self-Registered
Accounting:

Cost Allocation: 100%

Fund: 000001
Organization: 000011
Account: 00012
Program: 00013
Activity: 000014

APPROVAL FLOW

Legend: ☒ Active ☐ Pending

PR487780 → ☒ admin, a → ☐ Pond, Emily → ☐ Approved

Add Approver Delete Approver

COMMENTS

Add Comment

ATTACHMENTS

Add Attachment

Request: PR487780 of 306

APPROVING REQUISITIONS (NEW AND CHANGED)

Before you approve a requisition, you will want to review it carefully. Small details can become big problems when mistakes go unnoticed.

APPROVING THE REQUISITION

Although the **APPROVAL SUMMARY** screen displays most requisition details, it does not show everything. If you want to review information that is not on the **APPROVAL SUMMARY** screen (such as Shipping details), click the Requisition Number link that appears above the first line item (**Figure 165**).

Figure 165: Requisition Number Links to Summary Tab for Complete Details



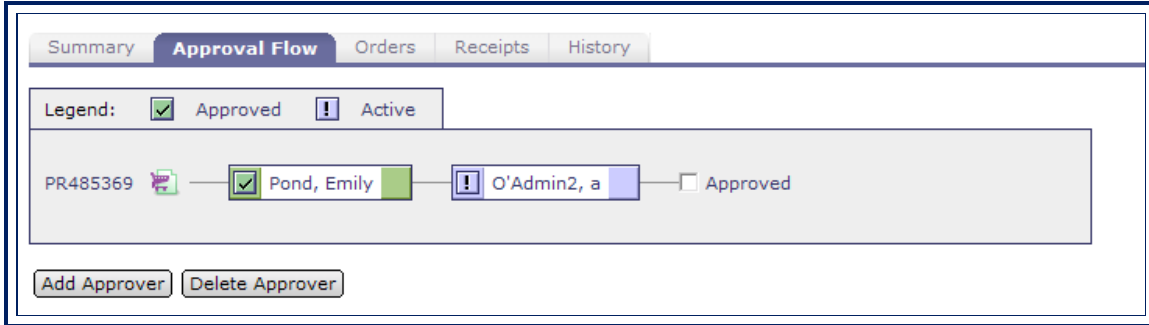
Table 18 provides a list of key details to review.

Table 18: Approval Review Guide

Detail to Review	Impact on Approval
Account Codes	Account Code fields might have been auto-populated with default values from the user's BSO profile. <ul style="list-style-type: none"> All requisitions should be evaluated to ensure they carry the correct Account codes.
Dollar value of requisition	<ul style="list-style-type: none"> Evaluate the total dollar amount of the requisition.
Bill To & Ship To	<ul style="list-style-type: none"> Verify that the addresses are correct for each line item.
Comments	Comments might provide specific details about what is being purchased and why. <ul style="list-style-type: none"> Verify the details and whether the comments will be included on the purchase order. If they are to be included on the purchase order, the Visible to Supplier checkbox must be selected. Also review comments inserted by prior approvers.
Attachments	Attachments also might provide specific details about what is being purchased and why. <ul style="list-style-type: none"> Verify the details and whether the attachment(s) will be included on the purchase order. If they are to be included on the purchase order, the Visible to Supplier checkbox must be selected.
Approval Flow	<ul style="list-style-type: none"> Verify the approval flow includes all required parties. Additional approvers may be added if necessary.
Shipping Details	<ul style="list-style-type: none"> Verify shipping details.

When you have completed your review, click **Approve** or **Deny**. The requisition will disappear from your **To Do** list. The preparer will be able to see your approval on the **Approval Flow** tab of the **REQUISITION DETAILS** screen (Figure 166).

Figure 166: Approval Flow Tab Tracks Requisition Approval Status



The screenshot shows the 'Approval Flow' tab selected in a requisition details screen. The legend indicates that a green checkmark represents 'Approved' and a blue exclamation mark represents 'Active'. The flow for requisition PR485369 shows it was approved by 'Pond, Emily' (green checkmark) and is currently active for 'O'Admin2, a' (blue exclamation mark). The final status is 'Approved' (green checkmark). Below the flow, there are buttons for 'Add Approver' and 'Delete Approver'.

EDITING A SUBMITTED REQUISITION

Users with Edit permission can edit a requisition and re-submit the revised version.

If you have this permission, you will see an **Edit** button next to the **Approve** and **Deny** buttons. Users who do not have this role will not see the button.

Click **Edit** to open the requisition in edit mode in order to make changes to editable fields such as **Quantity** or **Billing Address**. When you are finished, click **Save** to resubmit the requisition.

Editing the requisition causes the approval flow to reset according to the new values on the requisition. All required approvals will be re-applied unless the editing approver has a special role that prevents this. In that event, the editing approver will be given the opportunity to re-circulate the requisition to previous approvers.

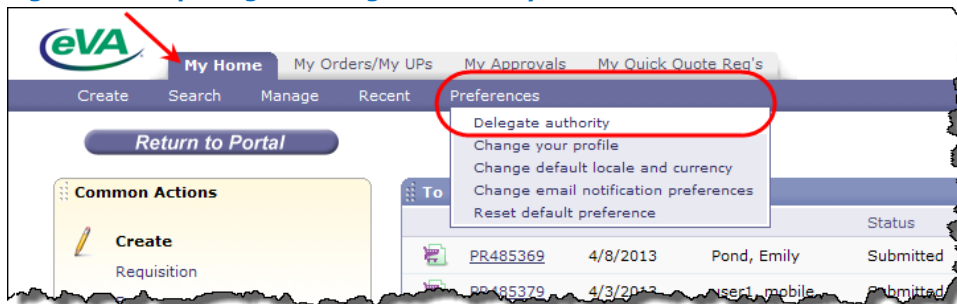
DELEGATING APPROVAL AUTHORITY

If you are going to be unable to access eVA long enough to cause delays for potential purchases (if, for example, you are going on vacation), you can temporarily delegate your approval authority to another user for a specified period of time. You can revoke the delegated authority at any time.

STEP 1: DELEGATE

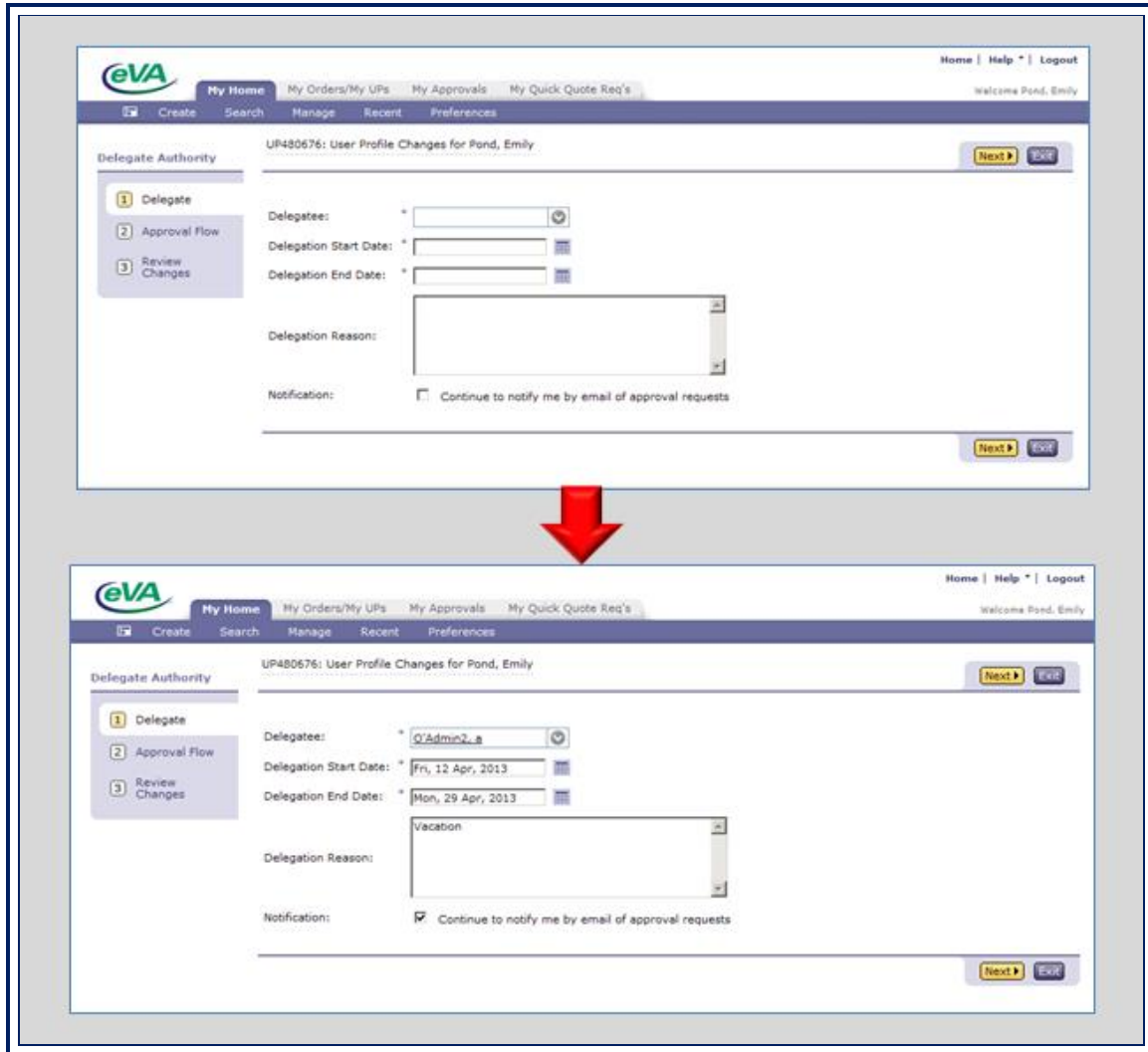
To delegate approval authority, go to the **My Home** tab on the **DASHBOARD** and select *Delegate authority* from the **Preferences** menu (Figure 167).

Figure 167: Opening the Delegate Authority Screen



Insert the required information on the Delegate Authority screen (Figure 168). If the name of the person to whom you want to delegate authority does not appear in the **Delegatee:** drop-down list, select **Search for more...** .

Figure 168: Completing Delegation of Authority



The figure illustrates the 'Delegate Authority' screen in the eVA system. The screen is titled 'UP480676: User Profile Changes for Pond, Emily'. It features a sidebar with three steps: 1. Delegate, 2. Approval Flow, and 3. Review Changes. The main form area contains the following fields:

- Delegatee:** A dropdown menu with a search icon.
- Delegation Start Date:** A date picker.
- Delegation End Date:** A date picker.
- Delegation Reason:** A text area.
- Notification:** A checkbox labeled 'Continue to notify me by email of approval requests'.

The bottom screenshot shows the fields populated with the following values:

- Delegatee:** QAdmin2_a
- Delegation Start Date:** Fri, 12 Apr, 2013
- Delegation End Date:** Mon, 29 Apr, 2013
- Delegation Reason:** Vacation
- Notification:** The checkbox is checked.

Use the calendar icons to set the **Delegation Start Date** and the **Delegation End Date**. The Delegation Start Date is the first date your delegate can act as your approver; the Delegation End Date is the date your delegation of authority expires. The delegation begins and ends at midnight on the specified dates, except when the delegation start date is the current date. In that case, the delegation is effective immediately.

You can enter a **Delegation Reason**, but this is not required. If you want to continue to receive approval notification emails while you are away, click the **Notification** checkbox; you and your delegate will both receive the notifications. When you are finished, click **Next**.

When you submit a Delegation of Approval, a User Profile (UP) document will appear in the My Documents list on your eVA dashboard.

STEP 2: APPROVAL FLOW

The default approval flow assigned to your user profile is displayed on this screen (Figure 169). Click **Next** when you are ready to proceed to the next step.

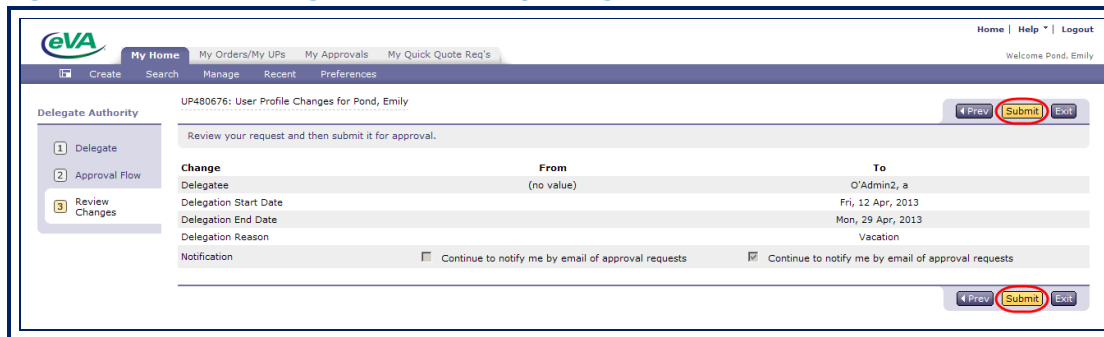
Figure 169: Approval Flow Screen



STEP 3: REVIEW CHANGES

The **REVIEW CHANGES** screen provides an opportunity to take a second look before you submit your changes (Figure 170).

Figure 170: Review Delegation of Authority Changes



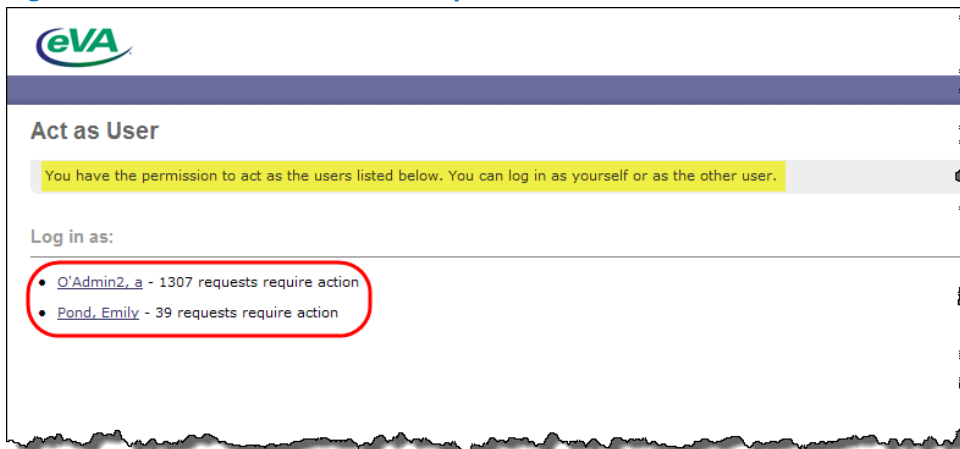
Change	From	To
Delegatee	(no value)	O'Admin2, a
Delegation Start Date		Fri, 12 Apr, 2013
Delegation End Date		Mon, 29 Apr, 2013
Delegation Reason		Vacation

When you are satisfied that your changes are correct, click **Submit** to activate your delegation of authority.

"ACT AS USER" SCREEN

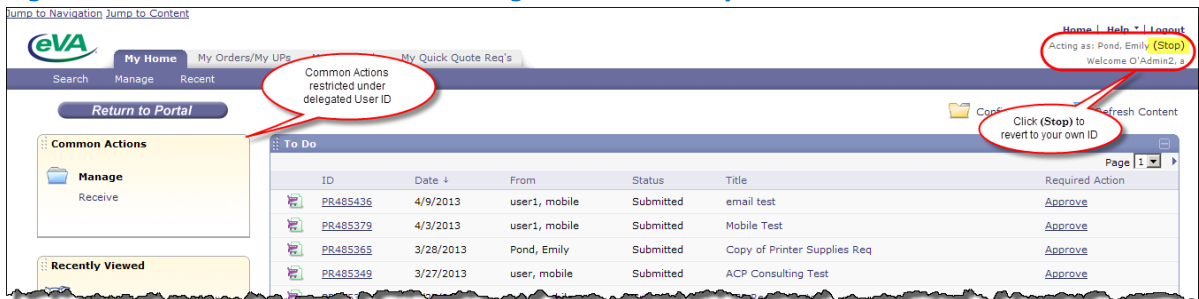
During the delegation period, your delegated approver will see the **ACT AS USER** screen (Figure 171) when accessing the eMall (Shop Now) link. This screen prompts the delegate to select the User ID to implement for that session. The delegate must choose whether to act under his own name for regular eMall functions, or to act as an approver on your behalf (or on behalf of another delegator, if applicable).

Figure 171: Act as User Screen Prompts ID Selection



When a user is acting under a delegation of authority, access to eMall functions is limited (Figure 172).

Figure 172: Restricted Access Under Delegation of Authority



A delegate can exit from the delegated User ID and resume using their own User ID without logging off and then logging back on. Instead, the delegate can click the (Stop) link in the upper right corner of the screen; eVA will restore full access under the delegate's personal User ID.

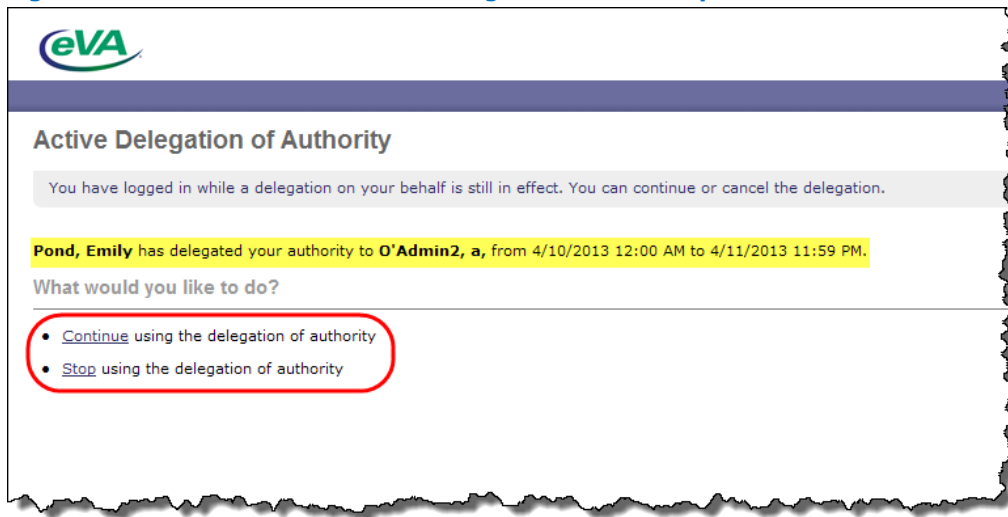


NOTE: When you are acting as an approver under another user's ID, you will not be able to create transactions under that User ID.

ACTIVE DELEGATION OF AUTHORITY

If you log on before your delegation of approval authority expires, you will be notified via the **ACTIVE DELEGATION OF AUTHORITY** screen (Figure 173). You must choose whether to Continue using the delegation of authority or to Stop using the delegation of authority by clicking the appropriate link. Your choice is effective immediately.

Figure 173: Reminder of an Active Delegation of Authority



12. WORKING WITH ORDERS

Orders are created from the requisition after the final approval. Each order is assigned a number and a prefix. The prefix helps to identify the order type, as explained earlier. To review that information, see [Section 2, Orders](#).

FINDING AN ORDER

There are several reasons you might need to access a particular order. For example, some orders cannot be delivered electronically to the supplier; these must be printed and mailed. Or you might want to find a particular order to check for updates from the supplier or to create a [Change Order](#).

FIND AN ORDER FROM THE REQUISITION

If you want to

- Review the orders generated by a particular requisition,
- Print and fax an order, or
- Make changes to an order (some users have permission to change the order directly),

the best strategy is to begin with the requisition. Find the requisition in the **My Documents** list on the **My Home** tab of your dashboard and open it by clicking the requisition number (ID) or Title (Figure 174).

Figure 174: Opening a Requisition to Access Associated Orders



	ID	Title	Date ↓	Status
	UP480676	Pond, Emily	4/9/2013	Processed
	PR485369	Govt Ctr - Printers and Supplies	3/28/2013	Ordered
	PR485365	Copy of Printer Supplies Req	3/28/2013	Ordered
	PR485268	Printer Maint - DHS	3/15/2013	Composing
	PR484948	Govt Ctr - Printers	2/7/2013	Composing
	DD484880	Work Station Hardware - Dept Upgrade	2/1/2013	Composing

[View List ...](#) (6)

WORKING WITH ORDERS

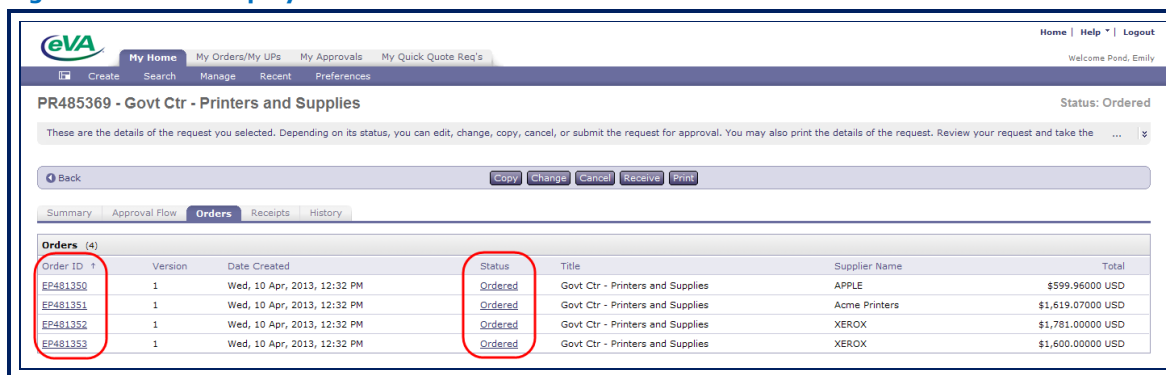
Select the **Orders** tab (Figure 175) in the open requisition to see a list of orders that have been generated.

Figure 175: Finding Orders for a Requisition



In the example shown in Figure 176, the requisition created four separate orders. Click the **Order ID** of the order you want to review to open the **ORDER** screen.

Figure 176: List Displayed on Orders Tab



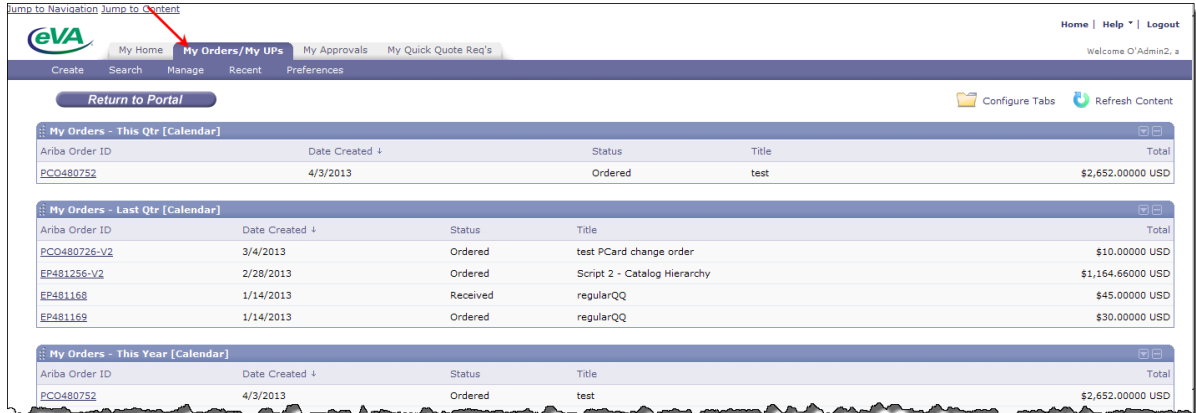
The screenshot shows the 'Orders' tab for requisition PR485369 - Govt Ctr - Printers and Supplies. The status is 'Ordered'. The table below lists the generated orders:

Order ID	Version	Date Created	Status	Title	Supplier Name	Total
EP481350	1	Wed, 10 Apr, 2013, 12:32 PM	Ordered	Govt Ctr - Printers and Supplies	APPLE	\$599.96000 USD
EP481351	1	Wed, 10 Apr, 2013, 12:32 PM	Ordered	Govt Ctr - Printers and Supplies	Acme Printers	\$1,619.07000 USD
EP481352	1	Wed, 10 Apr, 2013, 12:32 PM	Ordered	Govt Ctr - Printers and Supplies	XEROX	\$1,781.00000 USD
EP481353	1	Wed, 10 Apr, 2013, 12:32 PM	Ordered	Govt Ctr - Printers and Supplies	XEROX	\$1,600.00000 USD

FIND AN ORDER ON THE MY ORDERS/UPS TAB

If you know the order ID, you do not need to start with the requisition. Instead, you can go to your **DASHBOARD**, select the **My Orders/UPS** tab, and look in the **My Orders** list panes (Figure 177).

Figure 177: Access Orders Directly from the My Orders Tab




Ariba Order ID	Date Created ↓	Status	Title	Total
PCQ480752	4/3/2013	Ordered	test	\$2,652.00000 USD

Ariba Order ID	Date Created ↓	Status	Title	Total
PCQ480726-V2	3/4/2013	Ordered	test PCard change order	\$10.00000 USD
EP481256-V2	2/28/2013	Ordered	Script 2 - Catalog Hierarchy	\$1,164.66000 USD
EP481168	1/14/2013	Received	regularQQ	\$45.00000 USD
EP481169	1/14/2013	Ordered	regularQQ	\$30.00000 USD

Ariba Order ID	Date Created ↓	Status	Title	Total
PCQ480752	4/3/2013	Ordered	test	\$2,652.00000 USD

Find the order you need and access the **ORDER** screen by clicking the **Ariba Order ID** (Figure 178).

Figure 178: Order Accessed from Dashboard



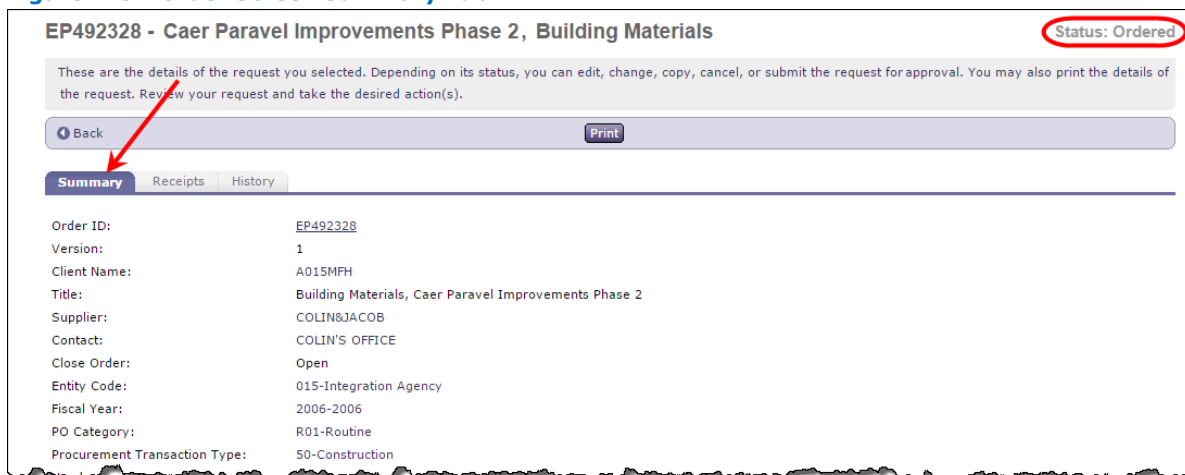
Ariba Order ID	Date Created ↓	Status	Title	Total
EP490131	2/28/2014	Ordered	nigp code broken	\$0.00000 USD
EP490132	2/28/2014	Ordered	nigp - jb1	\$34.55000 USD
EP490133	2/28/2014	Ordered	Copy of nigp - jb1	\$0.00000 USD
EP481993	1/9/2014	Ordered	III	\$10.00000 USD
EP481990-V2	1/9/2014	Ordered	test	\$10.00000 USD
PCQ480998	1/9/2014	Ordered	Test	\$10.00000 USD
EP490000	1/9/2014	Ordered	test	\$10.00000 USD
PCQ480995	1/7/2014	Ordered	Copy of Copy of Copy of Test Label	\$20.00000 USD

ORDER SCREEN

The **ORDER** screen displays the following tabs (you might see more or fewer tabs, depending on agency preferences and other factors):

- **Summary:** The **Summary** tab is the order-level counterpart of the Requisition Summary. It shows a detailed summary of the order, including line items and accounting information (Figure 179).

Figure 179: Order Screen Summary Tab



EP492328 - Caer Paravel Improvements Phase 2, Building Materials Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

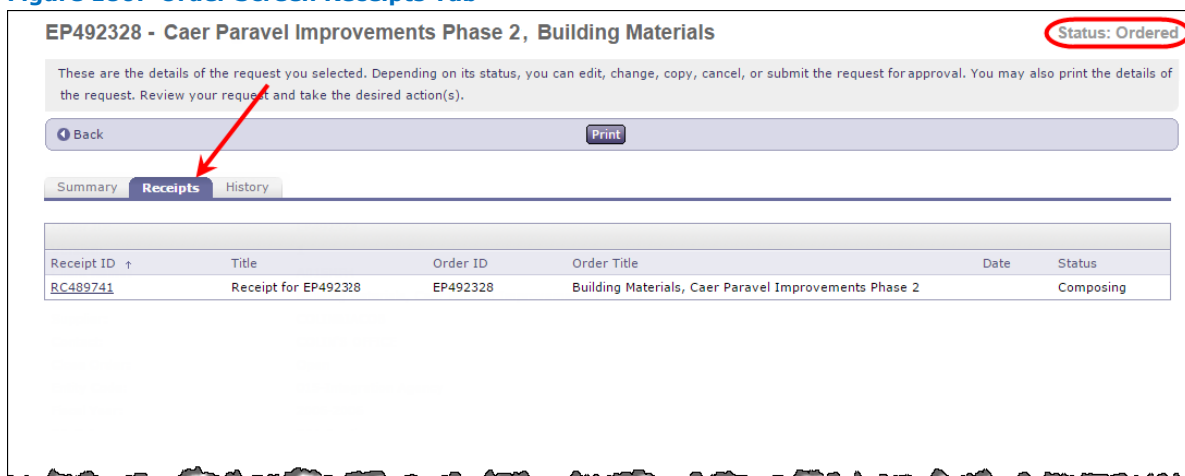
[Back](#) [Print](#)

Summary Receipts History

Order ID: [EP492328](#)
 Version: 1
 Client Name: A015MFH
 Title: Building Materials, Caer Paravel Improvements Phase 2
 Supplier: COLIN&JACOB
 Contact: COLIN'S OFFICE
 Close Order: Open
 Entity Code: 015-Integration Agency
 Fiscal Year: 2006-2006
 PO Category: R01-Routine
 Procurement Transaction Type: 50-Construction

- **Receipts:** The **Receipts** tab will display receiving information when it becomes available. For an in-depth look at the **Receipts** tab, see *eMall User Guide Volume 2*, which focuses on the Receiving process.

Figure 180: Order Screen Receipts Tab



EP492328 - Caer Paravel Improvements Phase 2, Building Materials Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

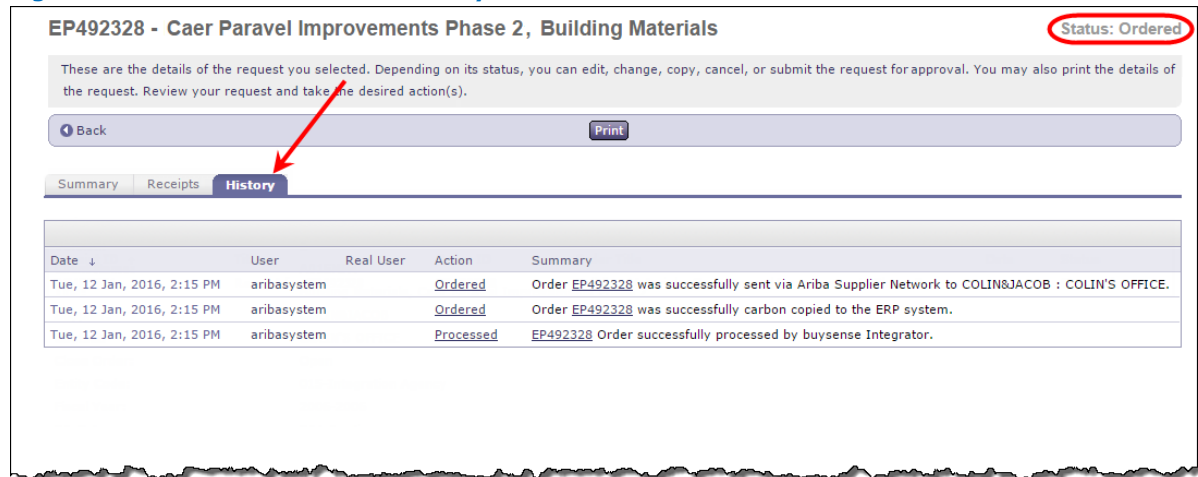
[Back](#) [Print](#)

Summary **Receipts** History

Receipt ID ↑	Title	Order ID	Order Title	Date	Status
RC489741	Receipt for EP492328	EP492328	Building Materials, Caer Paravel Improvements Phase 2		Composing

- **History:** The **History** tab displays information at the order level much like that provided at the requisition level on the requisition **History** tab. Successful submission and processing, changes to line items, etcetera, are shown on the order History tab (**Figure 181**).

Figure 181: Order with Tracked History



EP492328 - Caer Paravel Improvements Phase 2, Building Materials Status: **Ordered**

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

[Back](#) [Print](#)

Summary Receipts **History**

Date ↓	User	Real User	Action	Summary
Tue, 12 Jan, 2016, 2:15 PM	aribasystem		<u>Ordered</u>	Order EP492328 was successfully sent via Ariba Supplier Network to COLIN&JACOB : COLIN'S OFFICE.
Tue, 12 Jan, 2016, 2:15 PM	aribasystem		<u>Ordered</u>	Order EP492328 was successfully carbon copied to the ERP system.
Tue, 12 Jan, 2016, 2:15 PM	aribasystem		<u>Processed</u>	EP492328 Order successfully processed by buysense Integrator.

All tabs of the **ORDER** screen show the status of the order in the upper right corner.

ORDER STATUS

When orders are sent to suppliers electronically by the Ariba Network, their status is updated on the requisition **Orders** tab and the **My Orders/My UPs** tab on the **DASHBOARD**, as well as on the order itself. The status will be either *Ordering* or *Ordered*, depending on where the order is in the process. Note that an order should remain in *Ordering* status for only a short time. If *Ordering* status persists for longer than 30 minutes, contact eVA Customer Care for help.

Orders that are generated to a print vendor must be printed and mailed (or faxed) after the requisition moves to ordered status.

Most of the time, the order status will match the requisition status, but this is not always the case, especially when there are multiple orders under one requisition.

PRINTING AN ORDER

In practice, you would always know which orders must be printed and mailed or faxed to the supplier because the requester is the last person in the approval workflow, but if you are not certain, click the **Ordered** link (in the **Status** column) for the order in question. If you see a screen similar to the one shown in **Figure 182**, you must print your order and mail or fax it to the supplier. Click Back to return to the **Order** tab.

Figure 182: Not Ordered Through Ariba Network Message



On the **Order** tab, click the Order ID link of the order that you want to print.

When the order opens, click **Print** (**Figure 183**) to open a "printer friendly" version of the order (**Figure 184**).

Figure 183: Printing an Order

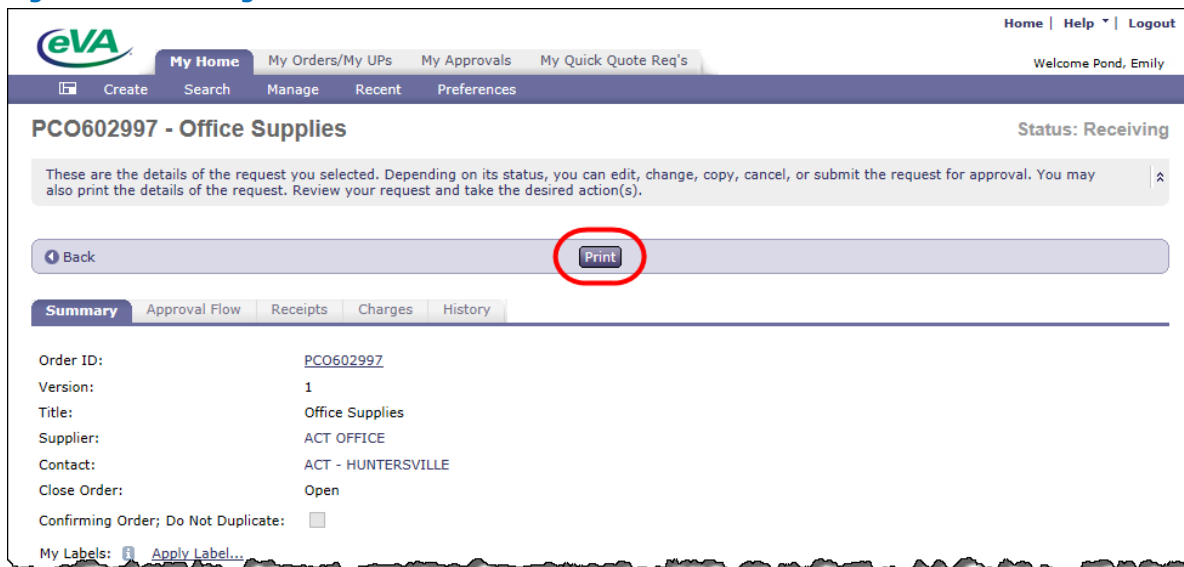



Figure 184: Order Formatted for Printing



Note that ordering information is for the Preparer, not the Requester (unless they are the same person).

Order No. PCO602997-

Issued on Tue Jan 19 15:14:07 EST 2016

Created on Tue Jan 19 15:14:07 EST 2016 by Pond, Emily

eVA Req#: PR622335

Supplier:
 ACT OFFICE
 11515 Wayward Way
 Charlotte NC 29999 United States
 Phone: 704-875-0432 Fax: 555-555-5555
 Contact: Betty Rubble
 Vendor TIN: *****4647
 SWAM: S,O

Ship To:
 DPS MAIL ROOM
 1111 East Broad St.
 Richmond, VA 23219 United States
 Phone: 804-555-6666 Fax: 804-555-6666

Deliver To: Mickey Smith

Ordering Person:
 Purch. & Supply EtoE
 Pond, Emily
 Phone: 804-786-3841
 E-mail: epond@agency.gov

Bill To:
 SP30 Billing Address
 4813 E. Seminary Shipping Billing
 RICHMOND, VA 23227 United States
 Phone: 804-111-1111 Fax: 804-222-2222
 E-mail: billing@agency.gov


Item	Item Number	Description	Need By	Quantity	Unit	Unit Price	Extended Amount	Contract Number
1		Cubicles for 16 person standard office structure	Thu Feb 25 00:00:00 EST 2016	1	lot	\$ 1,200 USD	\$ 1,200 USD	
2		Installation of all office equipment	Thu Feb 25 00:00:00 EST 2016	3	labour hour	\$ 120 USD	\$ 360 USD	

Line	Comments:

Total : \$ 2,960 USD

Status: Receiving

This order is governed in all respects by the laws of the Commonwealth of Virginia, including the Virginia Public Procurement Act, the Commonwealth of Virginia Agency Procurement and Surplus Property Manual, and the Commonwealth of Virginia Vendors Manual copies of which are available at www.eVA.virginia.gov. The stated price(s) include shipping FOB destination unless otherwise stated in the body of the order. In addition, this order is subject to an eVA transaction fee in accordance with the eVA Fee Schedule a copy of which is available at www.eVA.virginia.gov. This fee will be invoiced to your company, approximately 30 days after the order issue date specified above, by the Commonwealth of Virginia, Department of General Services. Any modification to these terms must be agreed to in writing by both parties prior to performance of this order.



NOTE: Press Ctrl + p to open a print window in any browser.

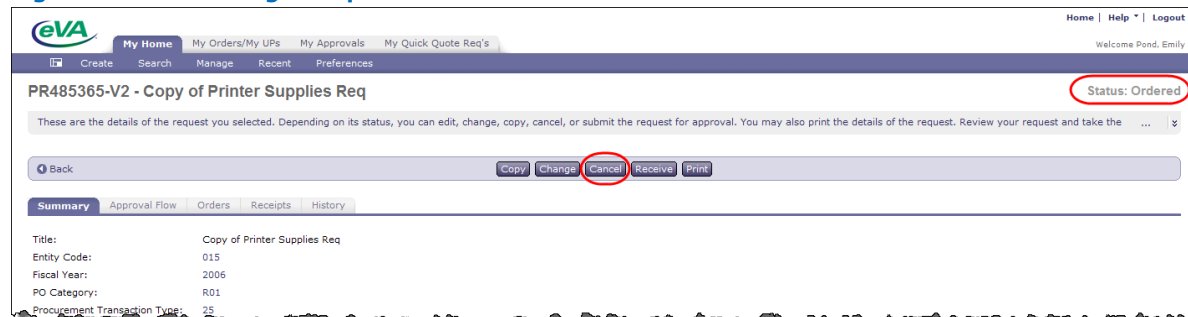
26-0010 Version 7

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CANCELING ORDERS

You can cancel a requisition that has been fully approved (*Ordered* status) and for which all associated orders have been sent to suppliers (**Figure 185**). The **Cancel** function can notify the supplier of the change *if* that supplier has agreed to receive order cancellations through the Ariba Network. If the supplier cannot accept electronically transmitted orders or cancelations, you must print the canceled order and mail or fax it to the supplier.

Figure 185: Canceling a Requisition in Ordered Status



When a requisition has entered *Receiving* or *Received* status, it cannot be canceled. (However, you can effect the same result by processing a return. For more information, see *eMall User Guide Volume 2, Returning Items*.)

Be aware that when you cancel a requisition, *all* of the orders generated by that requisition are also canceled.



WARNING! Be careful not to cancel an entire requisition if at least one of the orders on the requisition should not be cancelled. Instead, do a change to the requisition to remove the necessary line(s).

When you click **Cancel**, the system will:

- Display a **CANCEL ORDER – COMMENTS** screen, where you can enter a comment explaining why you are choosing to cancel this order.
- Remove all the approvals.
- Send a notification message to the buyer (when different from the preparer) stating that the request is canceled.
- Send a cancellation order to the appropriate supplier for each canceled order.
- Change the requisition status to *Canceled*.

Figure 186: Cancel Order – Comments Screen

Cancel Order - Comments

Enter comments before you cancel the request.

You chose to cancel **PR485365-V2.**

Comments: Requisition and associated orders cancelled.

☒ Visible to Supplier

☐ Mark as Proprietary and Confidential (This checkbox does not apply to approvers)

OK Cancel

13. MODIFYING REQUISITIONS

Requisitions can be changed in a number of different ways depending on the status of the requisition and what you are trying to accomplish. eVA tracks these changes and displays the information on the requisition's **History** tab. See the [Requisition History Tab](#) section of this guide for details.

Table 19 summarizes the options available under each requisition status.

Table 19: Change Actions by Status

Requisition Status	Available Actions
Composing	Submit / Copy / Delete
Submitted	Withdraw / Copy
Denied	Withdraw / Copy
Ordered	Cancel / Copy / Change
Receiving	Close Order / Copy / Change
Received	Copy NOTE: If a change is needed to a requisition in this status, it may be necessary to back out prior receiving. Refer to the eMall Guide, Vol 2.
Cancelled	None

Changes you can make to requisitions include:

- Creating a Change Order for a requisition in *Ordered* or *Receiving* status.
- Deleting a requisition you no longer need (*Composing* status only).
- Editing a requisition to insert additional lines and modify existing lines.
- Withdrawing a requisition that is in *Submitted* or *Denied* status.
- Canceling a requisition that is in *Ordered** status.
- Copying a requisition to use as a template.

*NOTE: A requisition in *Receiving* or *Received* status can be canceled only after all prior receiving is backed out. Refer to *eMall Guide, Volume 2*.

CHANGES THAT CAN BE MADE

Nearly everything on a requisition can be changed. See the tables below for restrictions and special situations.

HEADER CHANGES

The requisition header is composed of the data you fill in on the **TITLE** screen when you create the new requisition. As shown in **Table 20**, there are very few restrictions on changes to the header fields.

Table 20: Changing Header Fields

Header Field	Action	Comment
Use PCard	Change	<ul style="list-style-type: none"> Results in a new DO or EP order, or a new PCO, depending on whether or not the box is checked. The original order number is <i>not</i> versioned; it is canceled. Be sure to enter a requisition comment warning the supplier NOT to duplicate the order, if applicable. (Note that the supplier does not see header information on their order.)
Other header field	Change	<ul style="list-style-type: none"> No restrictions.

LINE ITEM CHANGES

Most restrictions on Line Item changes concern items that have been completely or partially received, or items added from PunchOut catalogs. Refer to **Table 21** for details.

Table 21: Changing Line Item Fields

Commodity Lines	Action	Comment
New Line Items	Add	<ul style="list-style-type: none"> No restrictions.
Existing Line Items	Delete	<ul style="list-style-type: none"> Cannot delete a line that has already been received. Cannot make the total order amount or quantity below zero. Changes to this field for items ordered from a PunchOut catalog must be made at the supplier's website, as directed by the system.
Quantity	Change	<ul style="list-style-type: none"> Cannot decrease quantity below zero. Cannot decrease below quantity already received without first backing out prior receiving. Cannot make total order amount or quantity below zero. For items selected from a PunchOut catalog, click on the underlined description to return to the PunchOut site to make the change..
Price	Change	<ul style="list-style-type: none"> Non-catalog items only.
Unit of Measure	Change	<ul style="list-style-type: none"> Non-catalog items only.
Description	Change	<ul style="list-style-type: none"> Non-catalog items only.
Commodity Code	Change	<ul style="list-style-type: none"> Non-catalog items only.
Other line item fields	Change	<ul style="list-style-type: none"> Some PunchOut item fields might not be eligible for mass editing. No other restrictions.

MODIFYING REQUISITIONS

Table 22 describes the actions you can take to modify a requisition, depending on its status.

Table 22: Modifying eMall Requisitions

Requisition Status	Change Button Available?	Action to Modify Requisition
Composing	No	A requisition in <i>Composing</i> status has not been approved or sent to any suppliers. It can be modified using the Edit function without the need to generate a change order.
Submitted	No	A requisition in <i>Submitted</i> status must be withdrawn to return it to <i>Composing</i> status; then you can edit it.
Denied	No	A requisition in <i>Denied</i> status can be opened , edited, and resubmitted.
Ordered	Yes	A requisition in <i>Ordered</i> status can be modified by clicking the Change button after clicking the PR ID number.
Receiving	Yes	A requisition in <i>Receiving</i> status can be modified by clicking the Change button after clicking the PR ID number. To change a quantity below what has already been received, prior receiving must be backed out.
Received	No	A requisition in <i>Received</i> status is closed. The order(s) must be reopened to return the requisition to <i>Receiving</i> status before a Change Order can be generated. Depending on the type of change required, you might need to back out prior receiving.

MODIFYING IMPORTED REQUISITIONS

Some kinds of imported requisitions can be modified in the eMall, while others must be changed in their original environment and then re-imported. Table 23 shows the various kinds of imported requisitions and the steps to be taken to change kind.

Table 23: How to Modify Imported Requisitions

Imported From	Special Condition	Change Button Available?	Comment
Interface (IRQ:)	Approved in eMall	Yes	Create a Change Order, or make changes in ERP and re-import.
	Approvals bypassed	No	Make changes in ERP and re-import.
Quick Quote (QQ:)	N/A	Yes	Make changes in the eMall.
eProcurement (E2E)	N/A	No	Lines cannot be edited.

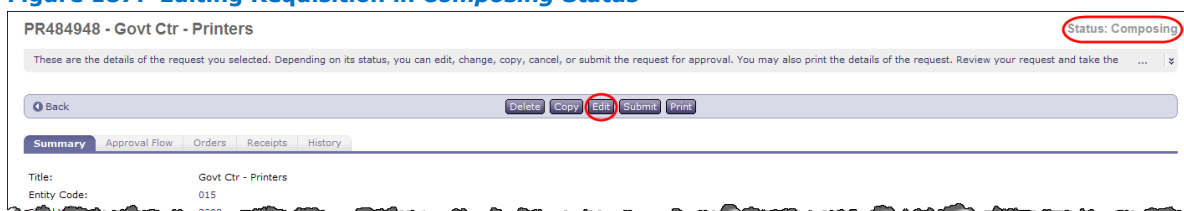
EDITING A REQUISITION

Unless you are the approver, a requisition must be in *Composing* status in order to be edited. When editing a requisition, you can access all of the same functionality that is available on a new requisition.

Open the requisition and click **Edit** to:

- **Add line items.**
- **Modify line items:** If the item was selected from a PunchOut catalog, you must return to that supplier's catalog to edit the item.
- **Perform Mass Edits:** Edit the same information for multiple items at one time.

Figure 187: Editing Requisition in *Composing* Status



After you make changes, review the requisition and click **Submit** to begin the approval process.



IMPORTANT! Only changes that impact the vendor, such as added line items or price changes, will generate a versioned **order**. If changes are made that do not impact the vendor, such as accounting code changes, the **requisition** will be versioned, but no new order will be generated to the supplier.

COPYING A REQUISITION

You can create a copy of an existing requisition to use as a template, regardless of the requisition status. It is recommended, however, that you do not copy a canceled requisition because cancelled line items cannot be copied. Items originally ordered from a PunchOut catalog also cannot be copied.

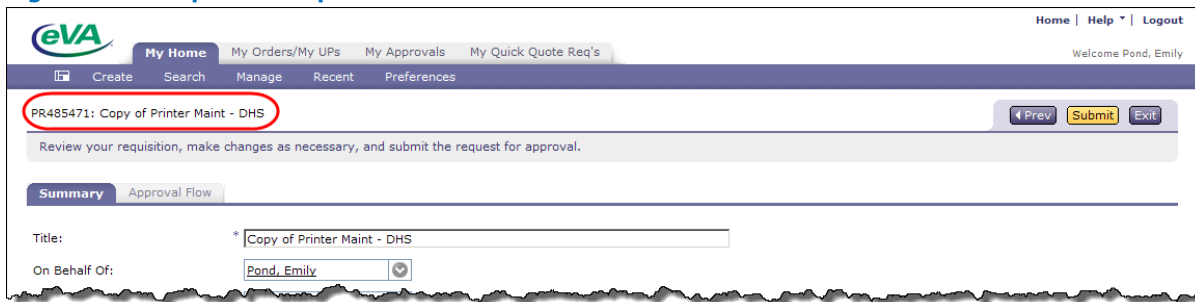
To copy a purchase requisition, find the requisition you want to copy on the **STATUS** screen. Select the checkbox next to that requisition and click **Copy**. You can also copy a requisition by opening an existing requisition and clicking the **Copy** button, as shown in **Figure 188**.

Figure 188: Copying Requisition to Use as Template



eVA will create a duplicate requisition, assign a new Requisition Number to it, and present the duplicate in Edit mode (Figure 189).

Figure 189: Duplicate Requisition in Edit Mode



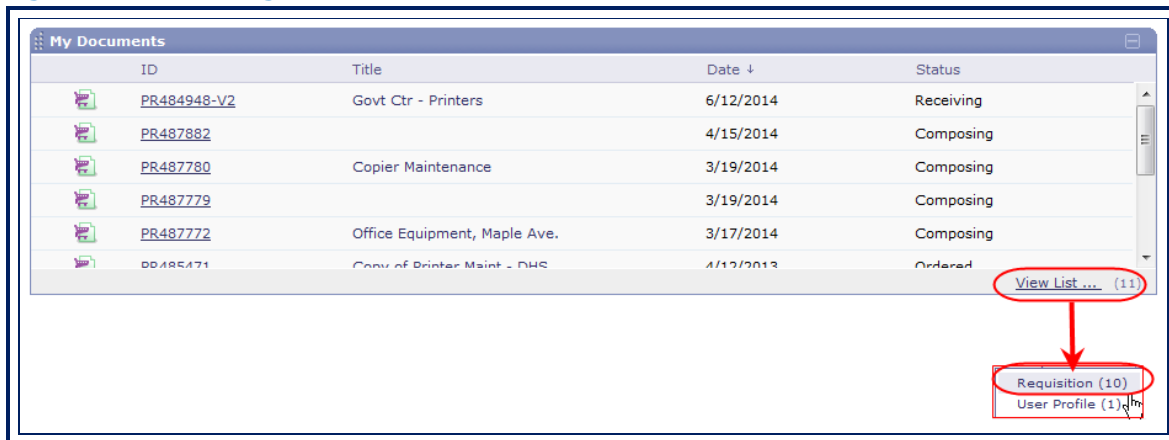
Make the desired changes and click **Submit** to begin the approval process.

DELETING A REQUISITION

Only requisitions in *Composing* status may be deleted. Requisitions that have moved beyond *Composing* status must either be returned to *Composing* status to be deleted (provided they have not moved to *Ordered* status), or they must be canceled.

Click View List ... on your **My Documents** list and select *Requisitions* to open the list in Search/Edit mode (Figure 190).

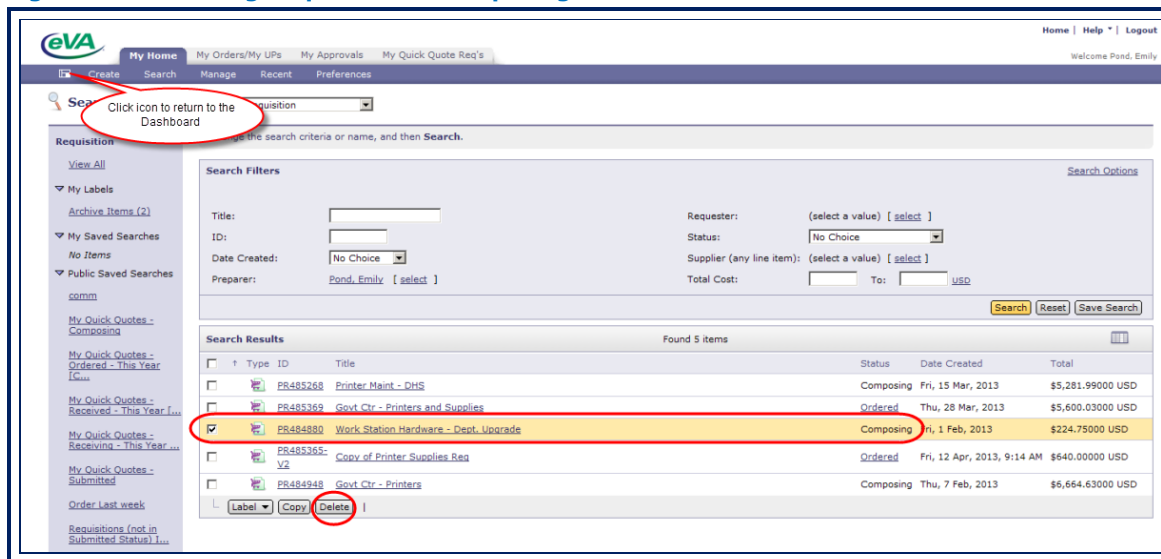
Figure 190: Accessing Editable List



MODIFYING REQUISITIONS

Select requisitions to delete by clicking their checkboxes. Make sure they are all in *Composing* status, and then click **Delete** (Figure 191).

Figure 191: Deleting Requisition in Composing Status



The screenshot shows the eVA requisition management interface. On the left, there is a sidebar with navigation links. The main area displays search filters and search results. A red circle highlights the 'Delete' button in the search results table.

Search Results	Found 5 items			
<input type="checkbox"/>	PR485268 Printer Maint - DHS	Composing	Fri, 15 Mar, 2013	\$5,281.99000 USD
<input type="checkbox"/>	PR485369 Govt Ctr - Printers and Supplies	Ordered	Thu, 28 Mar, 2013	\$5,600.03000 USD
<input checked="" type="checkbox"/>	PR484580 Work Station Hardware - Dept. Upgrade	Composing	Fri, 1 Feb, 2013	\$224.75000 USD
<input type="checkbox"/>	PR485355 Copy of Printer Supplies Bag	Ordered	Fri, 12 Apr, 2013, 9:14 AM	\$640.00000 USD
<input type="checkbox"/>	PR484948 Govt Ctr - Printers	Composing	Thu, 7 Feb, 2013	\$6,664.63000 USD

When you click **Delete**, the requisition will disappear from the document list and will be deleted from eVA. Composing requisitions that have been denied by an ERP during the integration process might not delete.



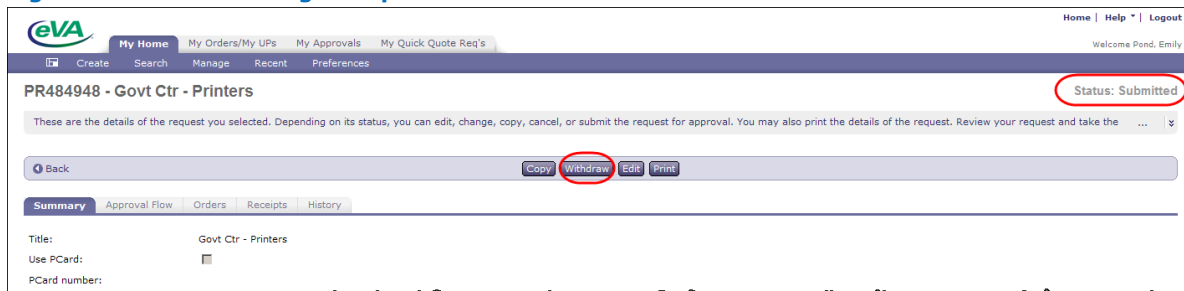
IMPORTANT! Be cautious when using Delete – a Delete action is permanent and cannot be reversed.

WITHDRAWING A REQUISITION

You can withdraw any requisition that is in *Submitted* or *Denied* status, as these requisitions have not been fully approved.

Open the requisition and click **Withdraw** (Figure 192).

Figure 192: Withdrawing a Requisition in Submitted Status



The screenshot shows the eVA requisition details page for PR484948 - Govt Ctr - Printers. The status is 'Submitted'. The 'Withdraw' button is highlighted with a red circle.

PR484948 - Govt Ctr - Printers Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the ...

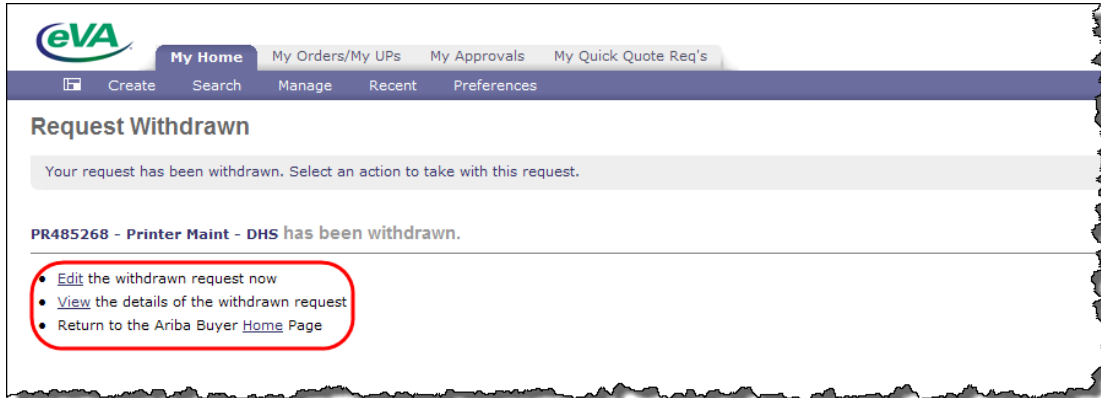
Back Copy Withdraw Edit Print

Summary Approval Flow Orders Receipts History

Title: Govt Ctr - Printers
Use PCard: ☐
PCard number:

The **REQUEST WITHDRAWN** screen confirms your action and provides links to continue with your work (Figure 193).

Figure 193: Confirmation of Withdrawn Request



When you withdraw a requisition, its status reverts to *Composing*. In *Composing* status, the requisition is treated like a new request; you can copy it, make changes and re-submit it, or delete it.



NOTE: When a requisition has entered *Ordered* status, it cannot be withdrawn because the order is in the hands of the supplier, but you can cancel a requisition in *Ordered* status.

REQUISITION HISTORY TAB

eVA tracks each requisition from submission through approval, ordering, and receiving, and displays a log-style summary of that information on the **History** tab (Figure 194). You will see a list of approvals, orders created, any new versions created through change orders, etcetera. If the requisition was copied or imported, it will be listed here, as will Receiving information.

The **History** tab contains only basic information, but details are easily accessed using the various links that are provided.

- Requisition numbers in the **Summary** column link to the requisitions' **Summary** tabs, where you can review line items and other details.
- Comments added by the preparer or by approvers are always linked.
- Warnings and error messages generated while the requisition was being prepared are also accessible using links from the **History** tab.

MODIFYING REQUISITIONS

Figure 194: Example of Requisition History Tab

Summary Approval Flow Orders Receipts History				
Date +	User	Real User	Action	Summary
Thu, 12 Jun, 2014, 2:30 PM	aribasystem		Processed	PR484948-V2 Order successfully processed by buysense Integrator.
Thu, 12 Jun, 2014, 2:30 PM	aribasystem		Ordered	Order EP481360-V2 was successfully sent to ERP.
Thu, 12 Jun, 2014, 2:30 PM	aribasystem		Ordered	Order EP481359-V2 was successfully sent to ERP.
Thu, 12 Jun, 2014, 2:30 PM	aribasystem		Processed	PR484948-V2 Order successfully processed by buysense Integrator.
Thu, 12 Jun, 2014, 2:25 PM	aribasystem		Warning	Wrong or missing supplier information.
Thu, 12 Jun, 2014, 2:25 PM	Pond, Emily	Pond, Emily	Approved	PR484948-V2 approved.
Thu, 12 Jun, 2014, 2:24 PM	aribasystem	Pond, Emily	Warning	Wrong or missing supplier information.
Thu, 12 Jun, 2014, 2:24 PM	Pond, Emily	Pond, Emily	Changed	Requisition properties were changed. Line items were changed. Comments . Previous version: PR484948 .
	Pond, Emily		Received	Items accepted: 3. Amount accepted: \$1,619.07000 USD.
	Pond, Emily		Received	Items accepted: 2. Amount accepted: \$149.98000 USD.
Fri, 12 Apr, 2013, 2:15 PM	aribasystem		Ordered	Order EP481362 was successfully sent via Ariba Supplier Network to DELL : DELL.
Fri, 12 Apr, 2013, 2:15 PM	aribasystem		Ordered	Order EP481361 was successfully sent to ERP.
Fri, 12 Apr, 2013, 2:15 PM	aribasystem		Ordered	Order EP481362 was successfully carbon copied to the ERP system.
Fri, 12 Apr, 2013, 2:15 PM	aribasystem		Ordered	Order EP481359 was successfully sent to ERP.
Fri, 12 Apr, 2013, 2:15 PM	aribasystem		Ordered	Order EP481360 was successfully sent to ERP.

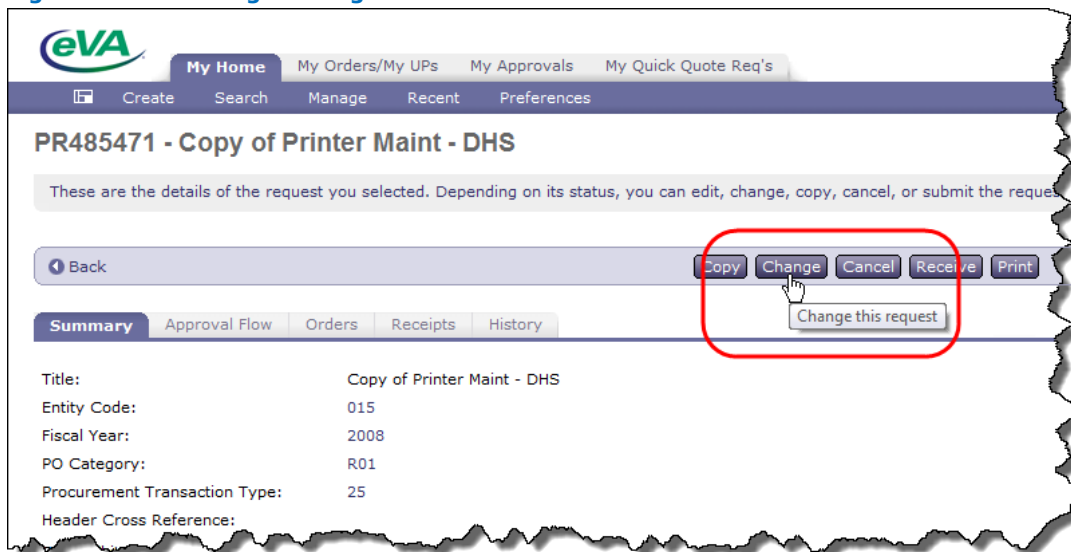
Note that timestamps do not appear for receiving on the **History** tab; however, you can see receiving dates on the **Receipts** tab.

14. CHANGE ORDERS

You might find that you have to change an order after it has been delivered to a supplier, while it is in *Ordered* or *Receiving* status. In these cases, you must create a Change Order.

To create a change order in eVA, open the current version of the requisition that generated the order you want to alter and click the **Change** button (Figure 195).

Figure 195: Creating a Change Order



Note that only requisitions that are in *Ordered* or *Receiving* status will display the **Change** button. If the requisition is not in *Ordered* or *Receiving* status, you must take steps to move it into an appropriate status before you can create a Change Order.

For example, an order in *Received* status is closed; you cannot alter a closed order. To make changes, you must reopen the order so that it will revert to *Receiving* status; then you can access the **Change** button on the requisition to create a Change Order. Refer to the [eMall_User Guide, Volume 2](#) for instructions.



NOTE: Only the preparer of the initial requisition can create the change order unless an individual has been granted special permission.

COMPLETING A CHANGE ORDER

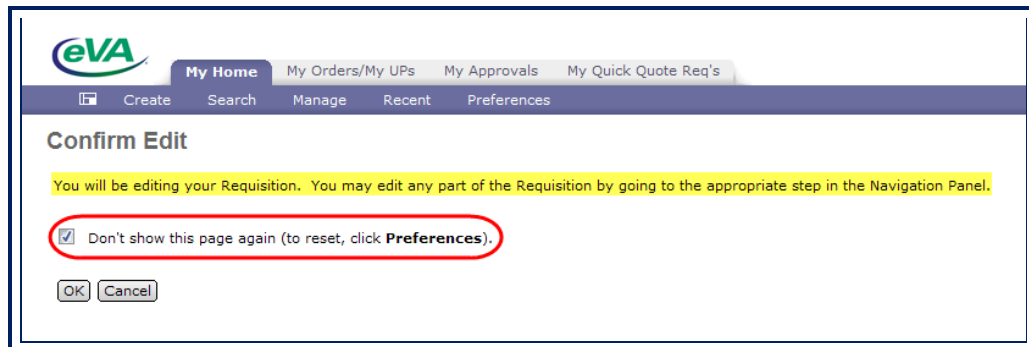
Follow these steps to complete and submit a Change Order.

1. As noted above, begin by opening the requisition for which you are creating the change order, and then clicking the **Change** button, as shown in Figure 195. (If the **Change** button is not visible, confirm that the requisition is in *Ordered* or *Receiving* status.)

CHANGE ORDERS

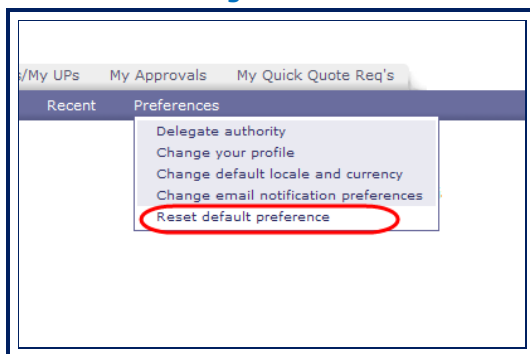
2. The **CONFIRM EDIT** screen opens (Figure 196). This screen will be presented each time you choose to change or edit a requisition. If you prefer to not see the confirmation screen, click the check box next to **Don't show this page again** before you click **OK** to proceed.

Figure 196: Click the Checkbox to Disable the Confirm Edit Screen



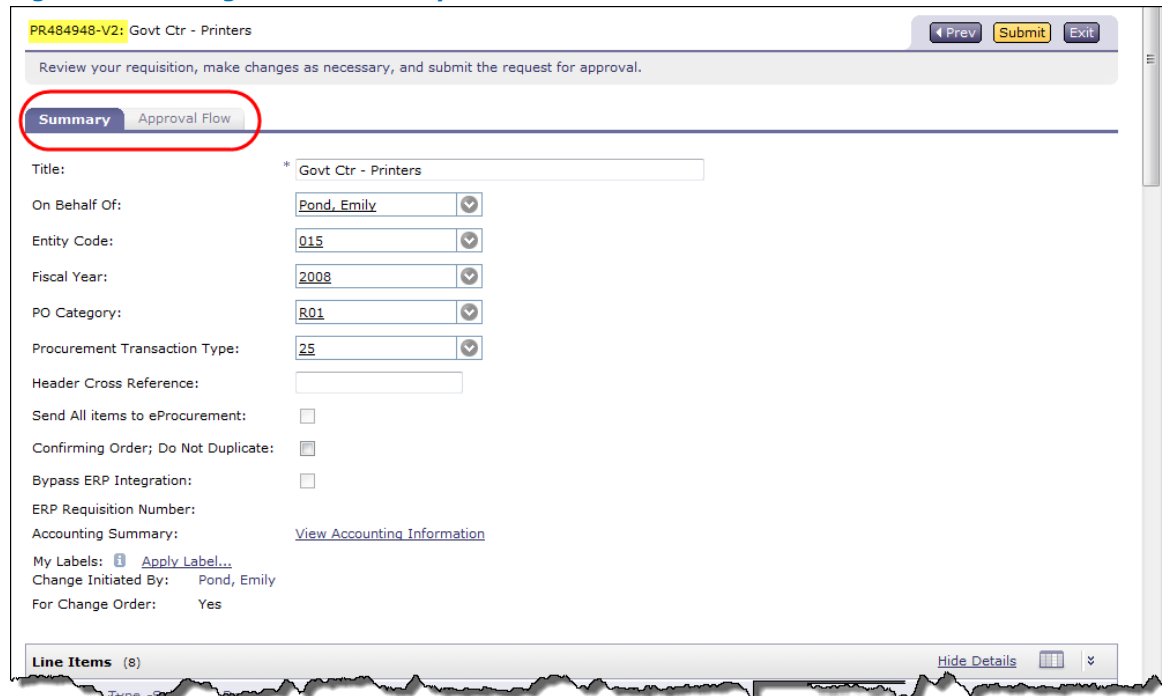
As noted on the **CONFIRM EDIT** screen, if you change your mind and want to re-enable the reminder, go to the **Preferences** menu and select *Reset default preference* (Figure 197).

Figure 197: Re-enabling the Edit Confirmation Prompt



3. The **Requisition Summary** tab will open in **Edit** mode. Notice the differences between the **Change Order Summary** tab and the regular **Requisition Summary** tab (Figure 198). The **Requisition Number** will be the same, but will have a version number appended to it; also, there will be only two tabs, **Summary** and **Approval Flow**, instead of the four tabs you would normally see.

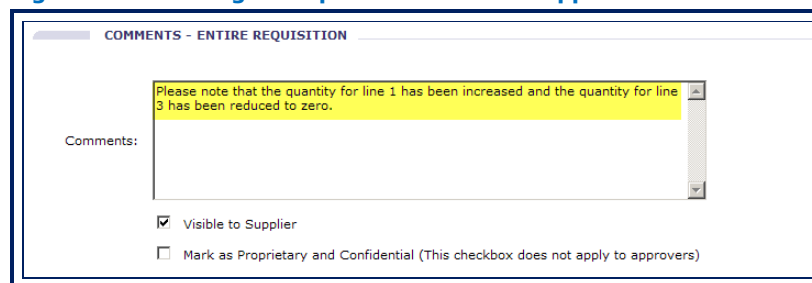
Figure 198: Change Order Summary Tab



Make your changes on the new version of the requisition.

4. When you have finished making changes, add a comment that clearly identifies the changes to the order and check **Visible to Supplier** (Figure 199).

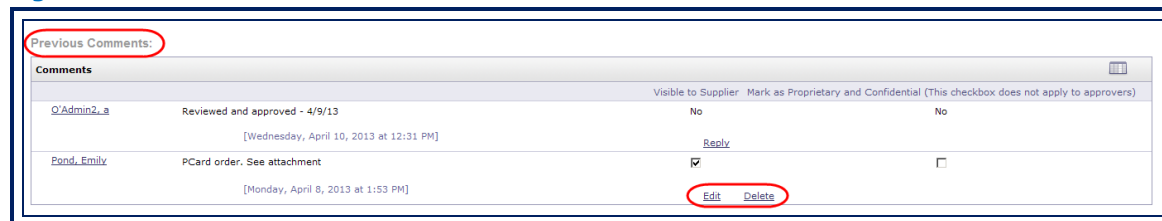
Figure 199: Adding an Explanation for the Supplier



When you know that the requisition will be divided into multiple orders, it may be more appropriate to use Line Item comments. Follow the procedure outlined under [Comments – by Line Item](#) in this manual.

- Before submitting the Change Order, confirm that all attachments and comments from the original order still apply. New comments and attachments are listed before earlier ones. Prior comments and attachments can be deleted or modified by clicking **Edit** or **Delete** (Figure 200).

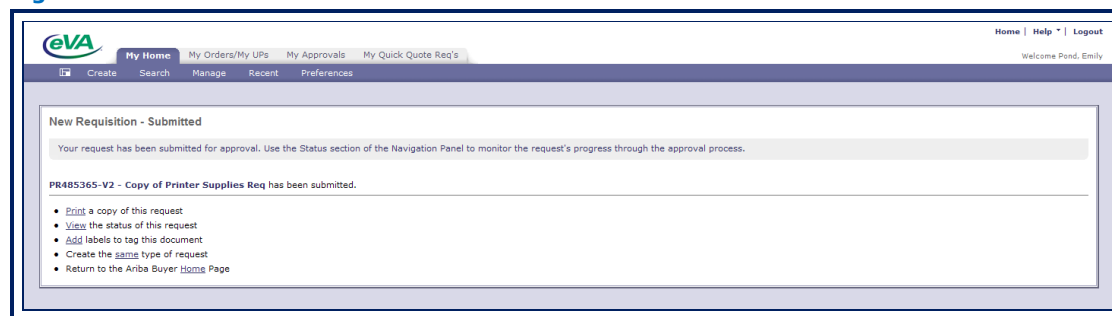
Figure 200: Review Prior Comments and Attachments



Previous Comments:			
Comments			
		Visible to Supplier	Mark as Proprietary and Confidential (This checkbox does not apply to approvers)
O'Admin2_a	Reviewed and approved - 4/9/13 [Wednesday, April 10, 2013 at 12:31 PM]	No	No
Pond, Emily	PCard order. See attachment [Monday, April 8, 2013 at 1:53 PM]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Reply	Edit Delete

- Click **Submit** to send the new version of the requisition through the **Approval Flow**. The confirmation message is the same as for a new requisition (Figure 201).

Figure 201: Confirmation of Submission



New Requisition - Submitted

Your request has been submitted for approval. Use the Status section of the Navigation Panel to monitor the request's progress through the approval process.

PR485365-V2 - Copy of Printer Supplies Req has been submitted.

- [Print](#) a copy of this request
- [View](#) the status of this request
- [Add](#) labels to tag this document
- Create the [same](#) type of request
- Return to the Ariba Buyer [Home](#) Page

After a Change Order passes through the Approval Flow and the requisition moves to *Ordered* status, new versions of the relevant orders are created and sent to the suppliers, following the same rules and procedures as the original orders. The previous version of the request will no longer be visible on your active documents lists such as **My Documents**. It will be replaced by the newer version of the requisition.

SEQUENTIAL CHANGE ORDERS

You can make repeated changes to orders. Each new requisition and order will receive the next version number in sequence.

Table 24 below illustrates how sequential changes in requisition PR123 create new order version numbers.

Table 24: Versioning a Requisition and Associated Orders

Requisition Change	Original PR	Original Orders	Resulting PR	Resulting Orders
Any Header Field (except PCard)	PR123	DO456 DO457	PR123-V2	No new versioned order
Use PCard	PR123	DO456 DO457	PR123-V2	DO456 canceled PCO788 created DO457 canceled PCO789 created
Any Line Field that Impacts Vendor	PR123	DO456	PR123-V2	DO456-V2

IMPORTANT NOTES REGARDING CHANGE ORDER PROCESSING

Some of the information in this section has been mentioned briefly in the preceding discussion of Change Orders, but it bears further discussion; communicating clearly with suppliers is critical.

DISAPPEARING CHANGE BUTTON

There are two scenarios in which the **Change** button becomes unavailable. The first is the most common and is easily remedied. The second scenario is very specific and much less common, but can also be remedied.

Scenario 1:

The most likely beginning of this scenario occurs when you are reviewing an order and determine that you need to make some changes. You open the requisition, only to find that the action buttons are missing.

In this case, think about the path you followed to reach the requisition. If you accessed the requisition through a line item on an order, the action buttons will not be available. To see the action buttons on the requisition, back out of the screen; conduct a search for the PR number, and then open it.

Scenario 2:

Suppose you want to create a Change Order for a requisition that is in *Receiving* status. You open the requisition and click the **Change** button as described in this manual, but before you can make any changes, your manager asks to speak with you for a few minutes. One thing leads to another, and by the time you return to your Change Order, you find that your session timed out and you have been logged off of the eMall.

CHANGE ORDERS

When you log in again, you find the requisition still in *Receiving* status and reopen it, only to find that the **Change** button is no longer available. Not only the **Change** button—all of the action buttons are gone and all you see is a **Back** arrow at the far left of the page (Figure 202). What happened?

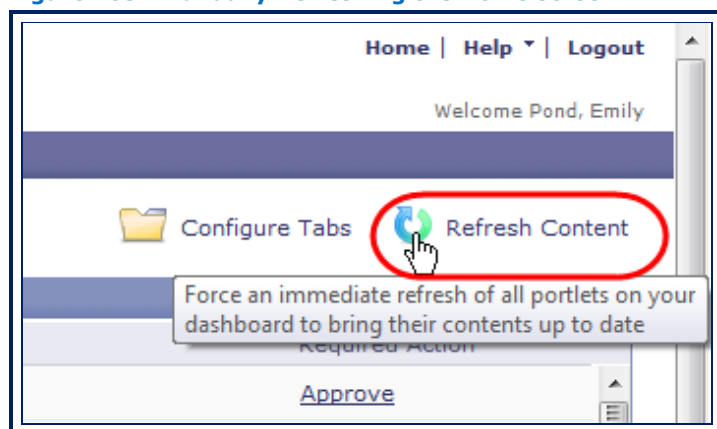
Figure 202: Missing Action Buttons



The most likely cause in this scenario is that the requisition moved into a temporary *Composing* status to enable you to make changes when you created the Change Order. When your work session times out due to lack of activity, the *Composing* status can sometimes persist behind the scenes, while a different status is indicated on your **DASHBOARD**.

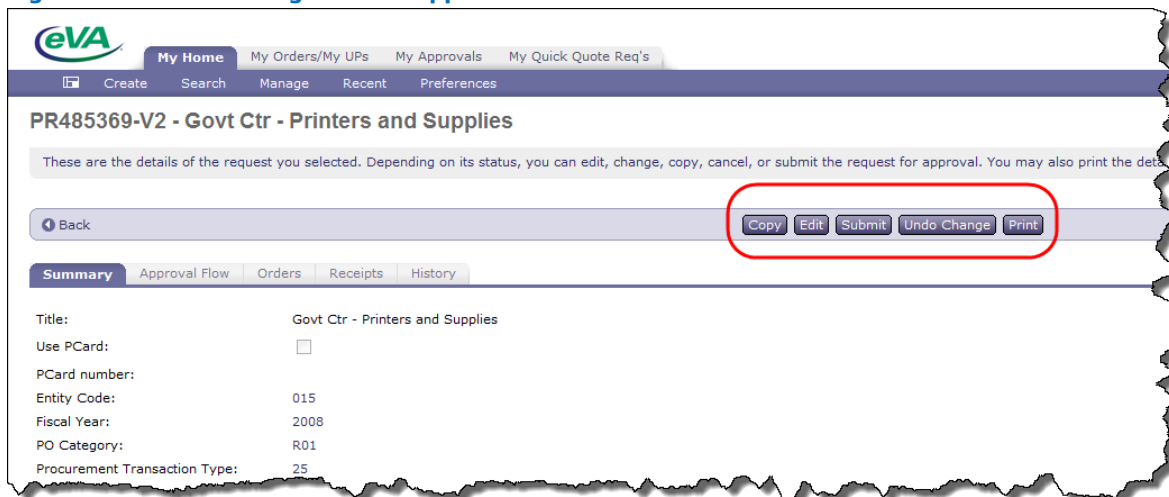
To remedy this situation, click the **Back** arrow or the **Dashboard** icon (under the eVA logo) to return to the **MY HOME** screen. Then click the **Refresh Content** icon to update the information displayed on the **DASHBOARD** (Figure 203).

Figure 203: Manually Refreshing the Home screen



Most often, the refresh action will move the requisition fully into *Composing* status. When you reopen it, you should find a full complement of buttons appropriate to a *Composing* requisition, plus an **Undo Change** button (Figure 204).

Figure 204: Undo Change Button Appears with Standard Action Buttons



To ensure that the Change Order is processed correctly and the supplier is properly notified, it is advisable to start over. Click the **Undo Change** button; the requisition will revert to its previous status (*Ordered* or *Receiving*), and the **Change** button will be activated.

If the refresh action does not succeed in moving the requisition to *Composing* status, contact eVA Customer Care at 1-866-289-7367 for help.

A CHANGE ORDER REPLACES THE ORIGINAL ORDER

When you process a change to your requisition, a new version of the order is sent to the supplier that contains all of the information necessary to act as a replacement for the previous version. If there is no change that impacts the supplier, no new order is created; however, the change will be noted on the PR **History** tab as *Action: Internal Change Order..* Suppose, for example, that Lines 1, 2, and 5 have been changed on a six-line order. The Change Order that is sent to the supplier will show all six lines. Lines 1, 2, and 5 will reflect the new values, while lines 3, 4, and 6 will retain their original values.

Busy suppliers might not realize anything has changed, even though the new order is marked **CHANGE ORDER** at the top. Help the suppliers (and yourself) by including a comment that contains a brief run-down of the changes.

FOLLOW UP WITH THE SUPPLIER

Even though the Change Order is clearly marked, and you have added comments to point out the changes at the requisition level and at the line item level, it is always wise to follow up with the supplier directly to ensure the Change Order is understood. This is especially true if you believe that the supplier might not be familiar with eVA Change Orders.

CHANGES MADE WHEN OTHER ACTION IS TAKEN

If a user begins receiving an order from a changed requisition that is in the process of being composed or approved, eVA will invalidate the changed requisition. This invalid requisition will not be permitted to complete required approvals and generate a change order. When this happens, the user must use the **Undo Change** button (Figure 204) to reverse the changes.

TRACKING CHANGE VERSIONS THROUGH ORDER HISTORY

A new version of a requisition is created when a preparer clicks **Change** on an existing requisition. As long as the change impacts the supplier, a new version of a purchase order is created when the submitted requisition is fully approved.. All change events are tracked on the Order **History** tab.

Figure 205: Change Order Tracked on the Requisition History Tab



PR485365-V2 - Copy of Printer Supplies Req					Status: Ordering
These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the ...					
Back Copy Print					
Summary Approval Flow Orders Receipts History					
Date	User	Real User	Action	Summary	
Fri, 12 Apr, 2013, 10:43 AM	Pond, Emily	Pond, Emily	Approved	PR485365-V2 approved. Comments .	
Fri, 12 Apr, 2013, 10:19 AM	Pond, Emily	Pond, Emily	Changed	Requisition properties were changed. Line items were changed. Comments . Previous version: PR485365 .	
Wed, 10 Apr, 2013	aribasystem		Ordered	Order EP481354 was successfully sent to ERP.	
Wed, 10 Apr, 2013	aribasystem		Processed	PR485365 Order successfully processed by buysense Integrator.	
Wed, 10 Apr, 2013	Pond, Emily	Pond, Emily	Approved	PR485365 approved.	
Thu, 28 Mar, 2013	Pond, Emily	Pond, Emily	Submitted	PR485365 submitted for approval.	

As new versions of requisitions and orders are created, older versions become obsolete. In eVA, these older versions are considered *Inactive*. Inactive orders will not appear on operational reports or status lists, but you can still view the original order information on the Requisition **History** tab (Figure 205).

15. UNDERSTANDING INTEGRATION

Integration is optional functionality that allows the eMall to communicate requisition and order data to an external system, such as an ERP or financial system, in real time. By providing this data to the external system, an organization can choose to automate internal processes such as pre-encumbrances, budget checks, inventory checks, or encumbrances.

Integration is turned on at the Agency level, and then set up at the BSO level within the organization. It uses dollar thresholds established for each BSO to determine whether a requisition or purchase order will be sent to the external system. If the requisition or purchase order dollar amount is below the established dollar threshold, integration will not occur.

Within the eMall, the requisition approval flow functionality is used to accomplish the integration with an external system.

AVAILABLE INTEGRATION POINTS

There are two possible integration points.

- Requisition: The requisition is used as the integration point for such things as pre-encumbrances and budget checks.
- Purchase Order: The purchase order is the integration point of choice for encumbrances and budget checks, for example.



NOTE: Attachments, whether for the entire requisition or for an individual line item, will not be sent to external systems.

HOW INTEGRATION USES THE APPROVAL FLOW

Integration uses the approval flow to pause the requisition ordering process until information is sent to an external system and a response is received.

REQUISITION INTEGRATION

Example: An agency wants to perform a budget check for all requisitions. Requisition Integration adds an approval step to the eMall workflow that causes the eMall to pass all of the requisition data to the external Finance system. The Finance system verifies the requisition data against the existing budget, returns an approval or a denial to eVA, and the eMall proceeds accordingly.

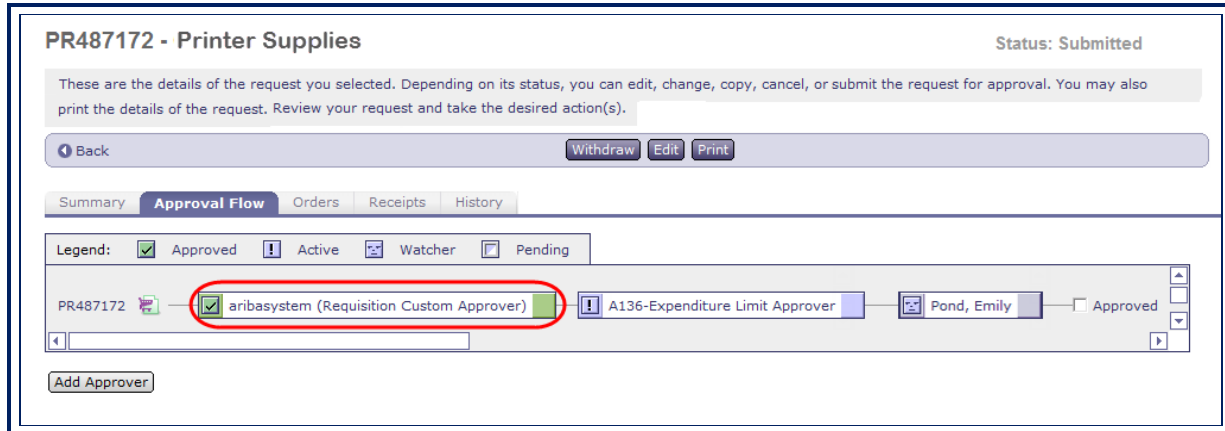
If your organization is set up for Requisition integration, the eMall will automatically add a Custom Approver to the workflow at the appropriate point to communicate with the external system (Figure 206). The Custom Approver step sends all of the requisition and vendor data to the external system.

UNDERSTANDING INTEGRATION

The external system will respond with a simple approve or deny transaction; it can include a comment and an error message (for deny transaction) for the requisition. The comment and error message can be used to provide instructions to the eVA user on any other actions they should take, such as changing an accounting code value.

Note: If your agency is set up for only Purchase Order integration (not Requisition integration), the Custom Approver is not added to the approval workflow. See the [Purchase Order Integration](#) section in this guide for further information.

Figure 206: Approval Flow with Custom Approver



The screenshot displays the 'PR487172 - Printer Supplies' requisition page. The status is 'Submitted'. The approval flow is shown in the 'Approval Flow' tab. The flow starts with 'aribasystem (Requisition Custom Approver)' (highlighted with a red circle), followed by 'A136-Expenditure Limit Approver', and then 'Pond, Emily'. The flow ends with 'Approved'. The legend indicates that a green checkmark represents 'Approved', a yellow triangle represents 'Active', a blue square represents 'Watcher', and a grey square represents 'Pending'. The 'Add Approver' button is visible at the bottom left.

After the Custom Approver has been approved by the external system, the eMall will move to the next approver in the approval flow.

Withdrawing or Canceling the Requisition

You will not be able to withdraw or cancel a requisition while waiting for a response from the Custom Approver.

Stalled Requisition

If the requisition has been waiting for a response to the Custom Approver for more than a day, it is considered to have stalled. Contact eVA Customer Care for help in resolving the issue.

PURCHASE ORDER INTEGRATION

Example: An agency wants to encumber funds for a purchase order. Purchase Order Integration ("PO Integration") adds a step *after* the final approval is obtained that causes the eMall to pass all of the order data to the external Finance system. The Finance system encumbers the funds and returns an approval to eVA, along with an ERP requisition number, and the eMall sends the fully approved requisition to the vendor as a purchase order.

PO Integration takes place for eMall orders only after all required approvals have been submitted. The PO Integration step is not displayed on the **Approval Flow** tab; instead, you will find it on the **History** tab, where it is displayed with an Action value of *Sent*, or, as shown in **Figure 207**, *Processed*.

Figure 207: Integration Step Displayed on History Tab

PR487704 - Printer Supplies

Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request.

Review your request and take the desired action(s).

Back

Withdraw

Edit

Print

Summary

Approval Flow

Orders

Receipts

History

Date	User	Real User	Action	Summary
Fri, 28 Feb, 2014, 11:00 AM	aribasystem		Ordered	Order EP490133 was successfully sent to ERP.
Fri, 28 Feb, 2014, 11:00 AM	aribasystem		Processed	PR487704 Order successfully processed by buysense Integrator.
Fri, 28 Feb, 2014, 10:54 AM	admin, a		Approval not required	PR487704 required no approval.
Fri, 28 Feb, 2014, 10:52 AM	admin, a	admin, a	Submitted	PR487704 submitted for approval.

RESPONSES BY EXTERNAL SYSTEMS

Table 25 lists the potential responses an external system can send back to the eMall for an Integration action and identifies the optional supporting information that may accompany that response.

Table 25: Integration Action Responses

Integration Point	Response	Optional Supporting Information
Requisition	Approve	Requisition Integration Number and a comment
	Deny	Signer Rule value to add new approver and a comment
Purchase Order	Approve	PO Integration Number and a comment
	Deny	Signer Rule value to add new approver and a comment

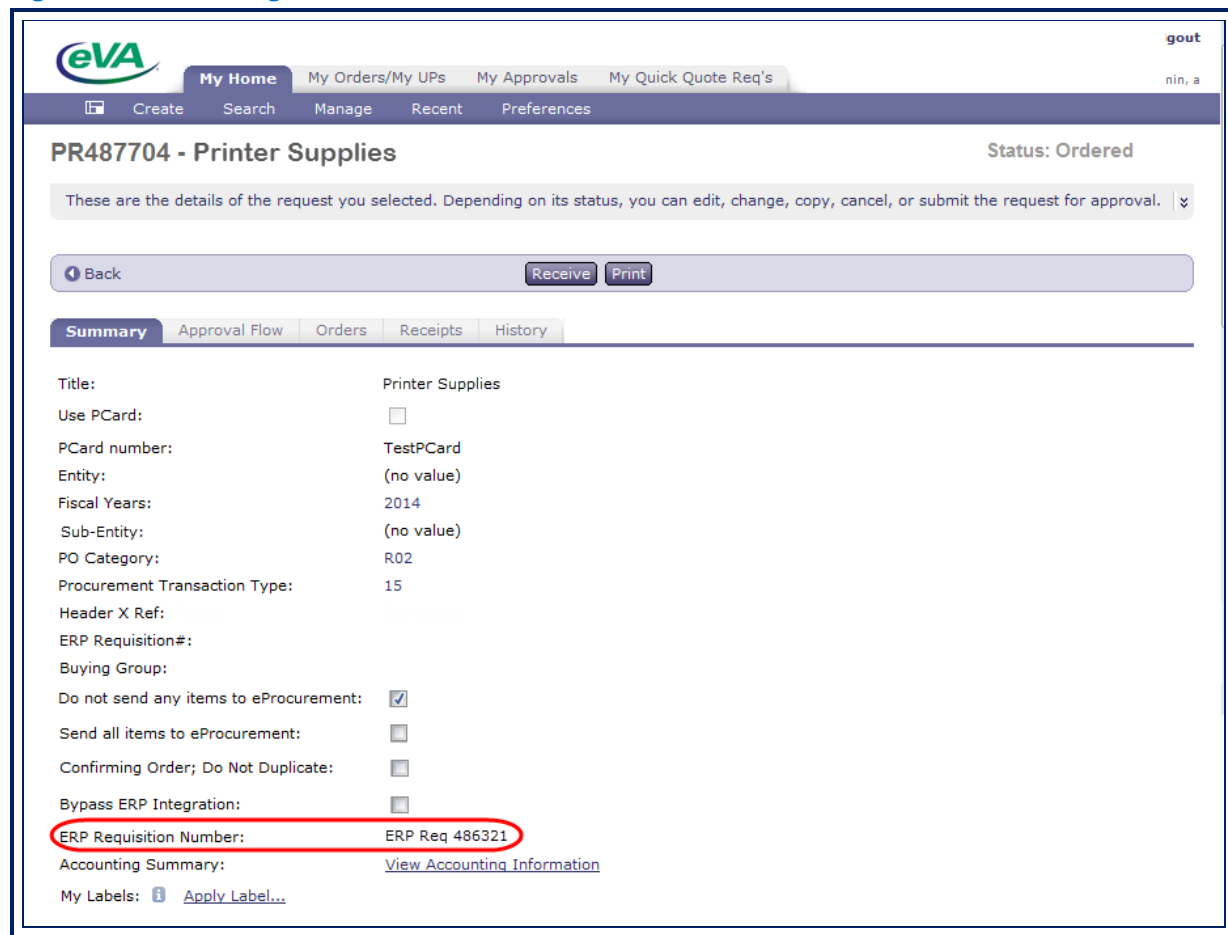
Approve Response

If the integration point is approved, the external system can assign a reference number as an identifier for the integration transaction and send it to the eMall. These types of values would be captured within the eMall on the standard requisition header field as shown in **Figure 208** below.

Note: The label for this field can be different for each organization, so your screen may be different from the example shown.

UNDERSTANDING INTEGRATION

Figure 208: ERP Integration Reference Number



PR487704 - Printer Supplies Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval.

Back Receive Print

Summary Approval Flow Orders Receipts History

Title: Printer Supplies

Use PCard: ☐

PCard number: TestPCard

Entity: (no value)

Fiscal Years: 2014

Sub-Entity: (no value)

PO Category: R02

Procurement Transaction Type: 15

Header X Ref:

ERP Requisition#: **ERP Req 486321**

Buying Group:

Do not send any items to eProcurement: ☒

Send all items to eProcurement: ☐

Confirming Order; Do Not Duplicate: ☐

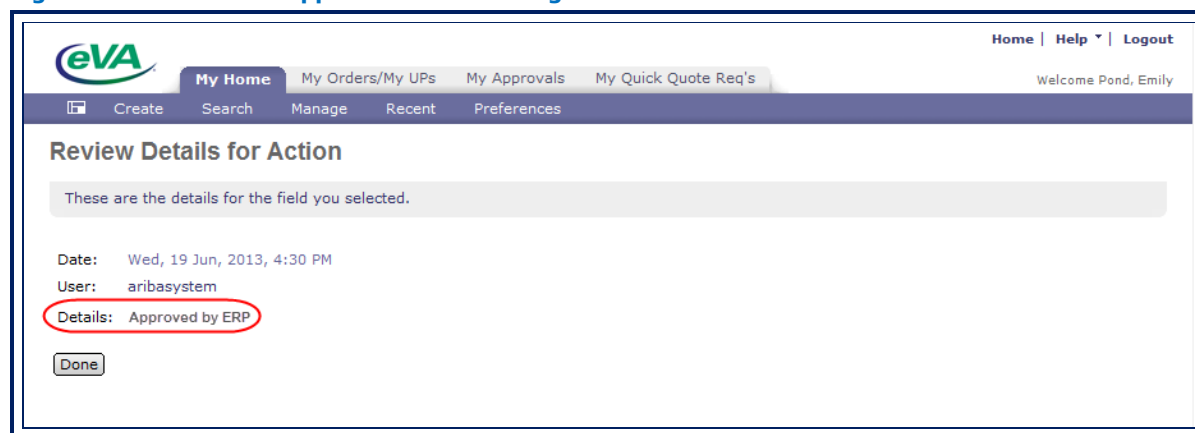
Bypass ERP Integration: ☐

Accounting Summary: [View Accounting Information](#)

My Labels: [Apply Label...](#)

The external system can also send a message back to the requisition with detailed information about the approval. This message can be viewed by clicking the appropriate Approved link in the **Action** column on the **History** tab.

Figure 209: Details of Approve Action Message



Review Details for Action

These are the details for the field you selected.

Date: Wed, 19 Jun, 2013, 4:30 PM

User: aribasystem

Details: **Approved by ERP**

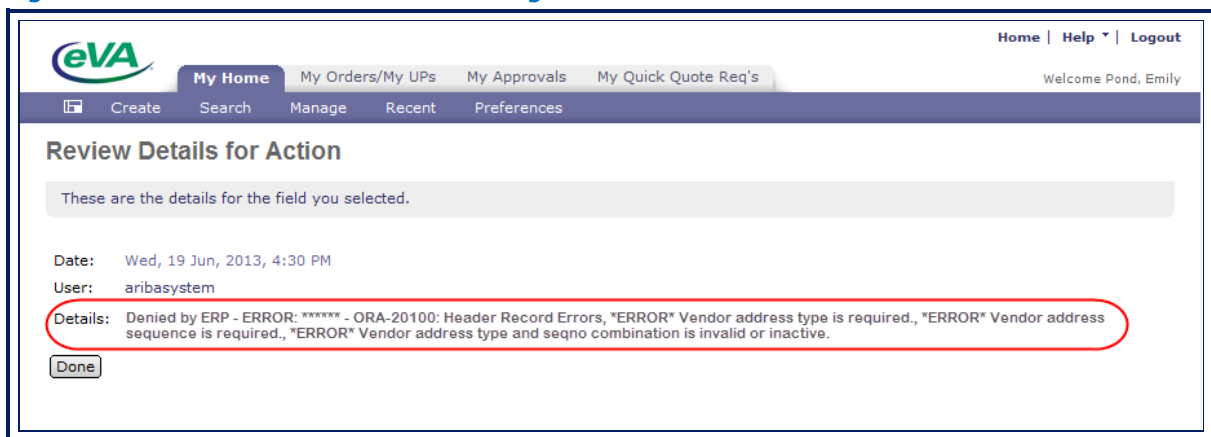
Done

Deny Response

If the integration point is denied, the requisition will be processed as a typical workflow denial: an email notice will be sent to the Preparer, and the requisition will be placed in *Denied* status. Along with the denial, the external system can send back a value that will cause a new approver to be inserted into the workflow if the denied requisition is re-submitted by the user. To view a new approver, click on the **Approval Flow** tab of the denied requisition.

The external system can also send a message back to the eMall with detailed information about the denial (**Figure 210**). This message can be viewed by clicking the appropriate Denied link in the **Action** column on the **History** tab.

Figure 210: Details of Denied Action Message



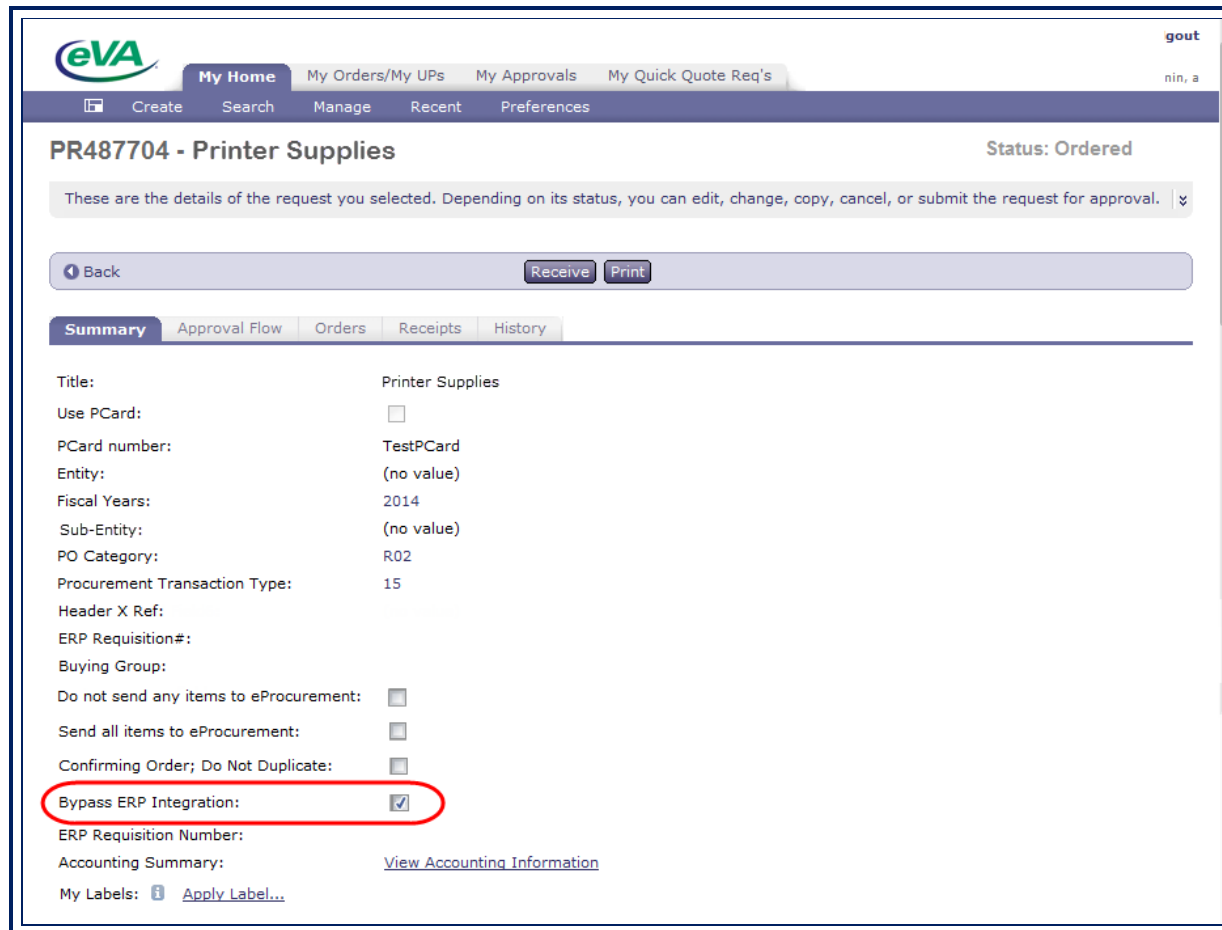
If the ERP system denies a requisition, the requisition could revert to *Composing* status. If this happens, **DO NOT** attempt to remove the original changes using the **Undo Change** button. Doing so results in synchronization issues between Ariba and the agency's ERP system. Instead, open the requisition and edit it.

HOW TO BYPASS INTEGRATION

You have the option to bypass integration for any requisition by clicking the **Bypass ERP Integration** check box on the requisition header (**Figure 211**). When this box is selected, information regarding this eMall requisition and the resulting order will not be sent to the external system.

Your organization may choose to insert an additional approver in the approval flow when this check box is selected. You should NOT select this check box unless your Purchasing Office has provided specific guidance on its use. Contact your supervisor if you are unsure of when to use the **Bypass ERP Integration** check box.

Figure 211: Bypass ERP Integration Check Box



The screenshot displays the eVA system interface for a request titled "PR487704 - Printer Supplies". The status is "Ordered". The interface includes a navigation bar with tabs for "My Home", "My Orders/My UPS", "My Approvals", and "My Quick Quote Req's". Below the navigation bar, there are buttons for "Create", "Search", "Manage", "Recent", and "Preferences".

The main content area shows the request details for "PR487704 - Printer Supplies". A message states: "These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval." Below this message are buttons for "Back", "Receive", and "Print".

The "Summary" tab is selected, showing the following details:

Title:	Printer Supplies
Use PCard:	<input type="checkbox"/>
PCard number:	TestPCard
Entity:	(no value)
Fiscal Years:	2014
Sub-Entity:	(no value)
PO Category:	R02
Procurement Transaction Type:	15
Header X Ref:	
ERP Requisition#:	
Buying Group:	
Do not send any items to eProcurement:	<input type="checkbox"/>
Send all items to eProcurement:	<input type="checkbox"/>
Confirming Order; Do Not Duplicate:	<input type="checkbox"/>
Bypass ERP Integration:	<input checked="" type="checkbox"/>
ERP Requisition Number:	
Accounting Summary:	View Accounting Information
My Labels:	Apply Label...

16. GETTING ANSWERS TO YOUR QUESTIONS

The eMall provides several help options for users. The purpose of this section is to give you an understanding of each option so that you will know how to find answers to any questions that arise while you are working in the eMall:

- Inline help tips
- Informational text
- eMall training guides
- eVA Customer Care

INLINE HELP TIPS

Inline help tips appear near the top of many eMall screens, as shown in **Figure 212**. They provide broad guidance regarding the purpose of the screen and the data it contains.

Figure 212: Inline Help Tip Near the Top of the Screen



For example, the inline help for the Requisition Title screen (above) reads, "Enter the requisition title and change one or more of the other requisition fields if necessary. If you are creating the requisition on behalf of another user, that user's accounting, shipping, and delivery information apply."

INFORMATIONAL TEXT


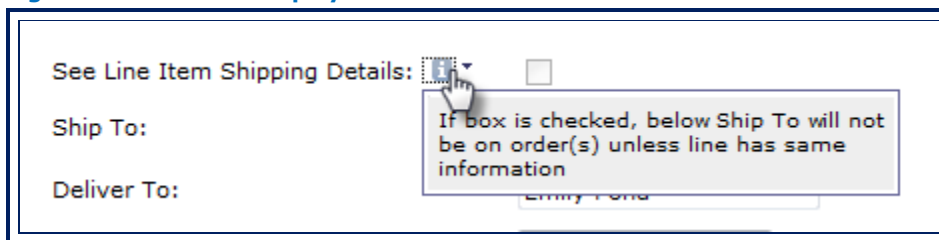
Informational text relates to a specific field on a screen. The presence of informational text is indicated by this icon: . The icon appears beside the field to which the information applies. Click the icon to view the associated informational text (**Figure 213**).

Figure 213: Click to Display Informational Text



USER GUIDES

Although there is a [Help](#) link in the upper right corner of every eMall screen, the guides that are available through that link are supplied by the procurement software vendor, Ariba. As such, these guides are very generic and do not address the many customizations that distinguish the eMall. The two volumes of the eMall User Guide, created specifically for eVA users, are the most detailed written resources.

In addition, you can log on to eVA and click the [Report and Resource Center](#) link to access eMall overviews and short-form training guides. Click the **Documents** tab as shown in **Figure 214** and scroll down to find the Training section.

Figure 214: Accessing Report and Resource Center Documents



COMPUTER BASED TRAINING (CBT)

There are a number of CBT videos available. These short videos provide quick lessons on creating requisitions, ordering from catalogs, editing multiple line items, and more.



To find these CBTs, simply click the **I BUY FOR VIRGINIA** button on the eVA home page, then click the [eVA Buyer Training](#) link, located under the banner on the right side of the screen.

eVA CUSTOMER CARE

NOTE: *If you have personal computer questions, contact your agency PC support.*

If you have eMall questions for which you cannot find answers, contact eVA Customer .
You can:

- Send an email to eVACustomerCare@dgs.virginia.gov.
- Call toll-free, 866-289-7367 from 8AM to 5PM Eastern time, Monday through Friday.

If you have purchasing policy or general operating policy questions, contact:

- Your organization's eVA DPS Account Executive, or
- Your organization's eVA Lead/Procurement Office.



See the eMall User Guide Volume 2 for information about other eMall functionalities, including Receiving.

For information about the eVA system, refer to the eVA Overview Guide.